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PRIVATE FLEETS

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COMMERCIAL CARRIER JOURNAL

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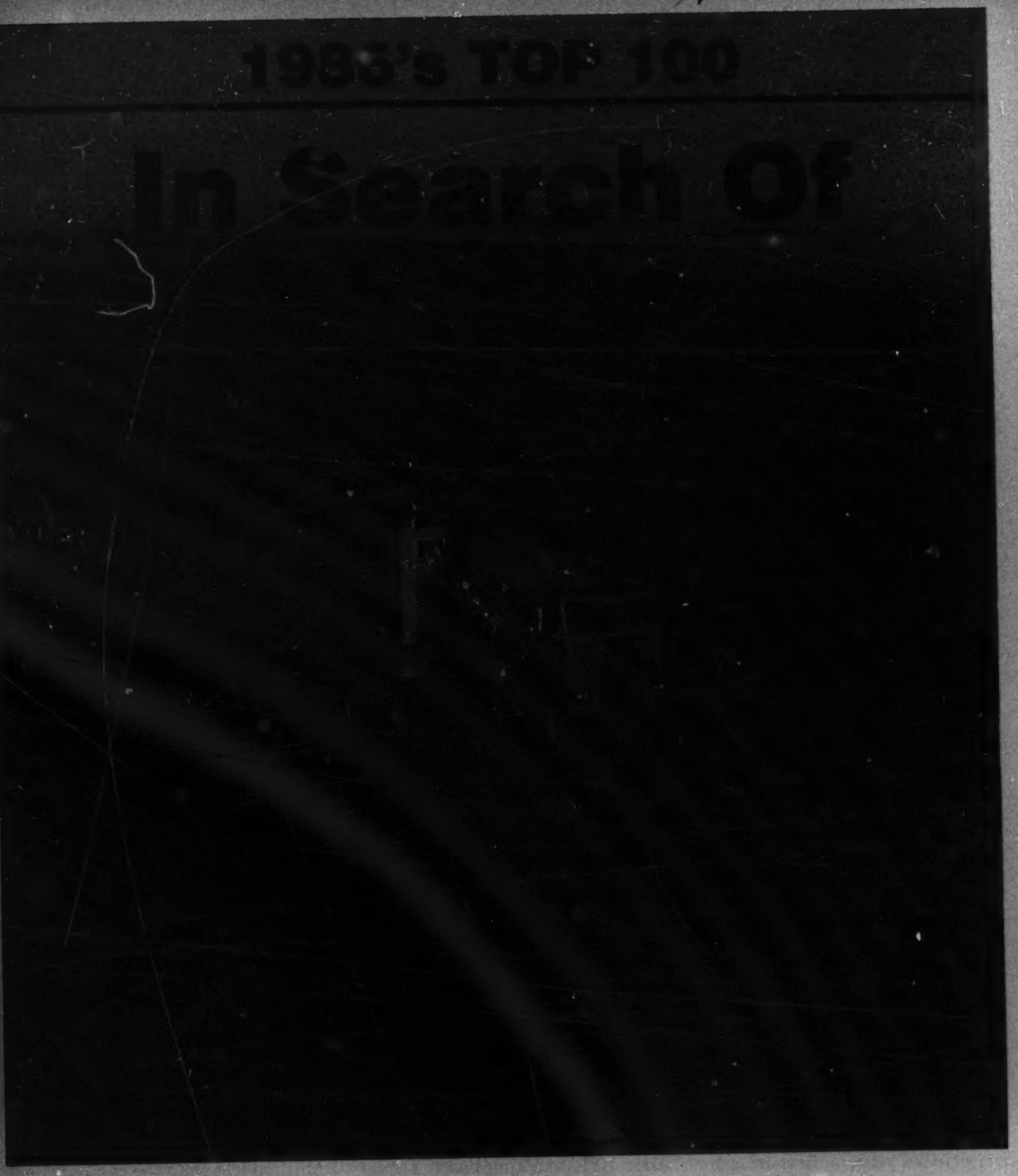
1987's TOP 100

In Search Of



By **CARL GLINES**, *Executive Editor,*

Aggressive cost management, rate cutting and acquisition fever fueled the financial performance of the Top 100 for-hire carriers in 1986. Revenues set new records, halting the cycle of declining profitability.

The nation's Top 100 truckload and less-than-truckload for-hire carriers reversed a cycle of declining profits in 1986—but just barely—as gross revenues and gross expenses, for the group, set new industry records.

While combined revenues increased almost $2 billion to $26,898,993,000, only 58 carriers benefited in terms of increased profits. Thirty-seven others reported a profit, but their earnings were less in 1986 than in '85. Only 12 carriers lost money, a substantial reduction from the 22 Top 100 carriers that lost money in 1985.

Continued

Top 100

The Top 100 figures for 1986 do not account for motor carriers that went out of business in 1986. It should be noted that some other carriers that appeared in 1985 do not appear in 1986, either because they were exempt from reporting by the Interstate Commerce Commission or they filed too late.

Coastal Tank Lines, ranked 114 in 1985, was acquired by Chemical Leaman and does not appear. Also not appearing individually as in the past, are Associated Truck Lines, Graves Truck Line and Garrett Freightlines. In 1986, the performance of this trio is reflected in combined results filed under ANR Freight System.

An examination of the Top 100 financial statistics for 1986—data accumulated and compiled by the American Trucking Associations exclusively for *Commercial Carrier Journal*—shows the greatest level of profitability was reported by the top 50 companies, 33 of which are classified as general commodity carriers.

The difference between 1986 and '85 in net profits for the top 50 was $209,987,000. The net profit difference for the same period for all Top 100 carriers was $209,192,000. That means the top 50 contributed $795,000 to the overall profitability of the group, not much when you consider the difference in revenue for the top 50 for the same period was $1.8 billion.

The big winners of 1986 continue to be in the truckload segment of the industry. J.B. Hunt of Lowell, Ark., continues its record of profit growth. The company is now ranked 25 and, for the third consecutive year, is first in operating ratio with a 77.

Builders Transport of Camden, S.C., classified as a building materials carrier, suffered a setback in 1986, dropping to 52 from 47. The company had lower revenues and net profit last year and higher expenses. Builder's operating ratio climbed to 92.2 from 86.9.

Last year was a year of acquisition for Builders Transport. The company acquired Jay Lines, Inc., Dallas-Fort Worth Station, Tex., for $5.5 million, plus certain assets belonging to Mendenhall and Continental Carrier Corp., a wholly-owned subsidiary of Mendenhall Enterprises. Jay Lines is ranked 144 this year.

B.M. Shirley, Builders president, said the company recognized it had a "freight balance" problem that resulted in lower earnings. Although the problem was being addressed, he said: "Material improvement in the company's performance is not anticipated until the spring of 1987." The company also had lower earnings because of a $350,000 increase in insurance reserves and higher income taxes of $526,000 attributed to the Tax Reform Act.

The Top 100 figures for 1986 confirm that Yellow Freight, of Overland Park, Kan., garnered the industry's number one LTL position, pushing Roadway Express, Akron, Oh., into 4th place in the Top 100. Consolidated Freightways, Portland, Ore., remained securely in 5th place. All three reported increases in revenue and net profits, but Roadway stayed the most profitable, reporting a net income of $96.6 million for the year on revenues of $1.5 billion. By contrast, Yellow, despite a bigger market share, reported revenues of $1.6 billion. Yellow's net profits were $74.4 million. Roadway's expenses were $128.1 million less than Yellow's. Roadway's operating ratio for 1986 was 90.3, slightly better than Yellow's 91.5 and CF's 92.1.

In its annual report, Consolidated Freightways said it is the first LTL trucking-based company in the U.S. to generate $2 billion in revenue. That figure, however, represents consolidated revenues. The Surface Transportation group reported revenues of $1.8 billion, a 14% increase over 1985. This group includes CF, two Canadian subsidiaries (Canadian Freightways; Canadian Freightways Eastern), plus three regional carriers, Con-Way Western Express, Con-Way Central Express and Con-Way Eastern. The company is also in the process of starting up Con-way Southern. Con-Way Eastern is ranked 140 in the Second 100.

The big three—Yellow, Roadway and CF—hold about 25% of the total LTL market. Analyst William Legg of Alex. Brown & Sons, Inc., Baltimore, Md., sees that market share increasing 10% within five years. Legg sees this 10% growth coming from shippers who may give up their private fleets in exchange for cheaper rates and better performing LTL carriers with nationwide distribution systems. Yellow Freight, for example, is adding about 70 new terminals in 1987, the same number as it did in 1986.

United Parcel Service of St. Charles, Ill., and New York, continue their profitable ways.

Ranked number one is UPS of Greenwich, Conn., formerly listed as St. Charles. Number two is UPS of New York, now also listed as Greenwich. Both units had higher revenues, but lower profits. Taken jointly, the UPS shortfall in net profits for 1986 amounted to $13,663,000. The totals are $354,460,000 for 1986 verses $368,123,000 for '85.

While some motor carriers continue to unearth profits, others continue to dig themselves deeper into a hole.

One of those is Pilot Freight of Winston-Salem, N.C., considered to be the cornerstone of TNT's U.S. International trucking network. TNT is headquartered in Australia. In 1986, Pilot Freight lost $7.4 million which was $6.4 million less than the company lost in 1985. The red ink came despite increased revenues of $517,000. Taking 1984's performance into consideration, Pilot Freight has lost nearly $33.3 million in three In the U.S., TNT owns BestWay Transportation of Phoenix, Ariz.; TNT Express, Huntington Beach, Calif.; TNT Holland Motor Express, Holland, Mich.; TNT Just-

Continued

1	1	UNITED PARCEL SVC INC, GREENWICH, CT	CMGF	$5334812	$4771556	$287747	5.4	32.9	1.21	0.00
2	2	UNITED PARCEL SVC INC NY, GREENWICH, CT	CMGF	2037490	1899623	66713	3.3	17.7	1.33	0.00
3	4	YELLOW FREIGHT SYSTEM INC, OVERLAND PARK, KS	CMGF	1619175	1482285	74425	4.6	19.4	0.80	0.34
4	3	ROADWAY EXPRESS INC, AKRON, OH	CMGF	1499179	1354100	96613	6.4	11.7	0.86	0.00
5	5	CONSOLIDATED FRTWAYS OF DE, PORTLAND, OR	CMGF	1467329	1351606	71186	4.9	13.7	1.09	0.12
6	6	NORTH AMERICAN VAN LINES INC, FORT WAYNE, IN	CMHG	744919	723000	23490	3.2	10.2	1.98	0.99
7	7	P*I*E NATIONWIDE INC, JACKSONVILLE, FL	CMGF	660018	653869	4173	0.6	9.8-	0.94	1.88
8	8	OVERNITE TRPTN CO, RICHMOND, VA	CMGF	529742	445078	43789	8.3	18.2	2.85	0.01
9	9	A B F FREIGHT SYSTEM INC, FORT SMITH, AR	CMGF	500146	470795	11492	2.3	38.9	0.50	2.00
10	10	CAROLINA FRT CRRS CORP, CHERRYVILLE, NC	CMGF	474032	438661	17483	3.7	19.5	0.99	0.33
11	13	UNITED VAN LINES INC, FENTON, MO	CMHG	397646	394147	3592	0.9	5.2	1.21	0.55
12	NR	ANR FREIGHT SYSTEM INC, DENVER, CO	CMGF	397439	397207	451-	0.1-	1.2-	1.10	0.20
13	12	ALLIED VAN LINES INC, BROADVIEW, IL	CMHG	376907	377246	3656	1.0	0.7-	1.00	0.25
14	14	SMITH'S TRANSFER CORP, STAUNTON, VA	CMGF	363616	360824	4332-	1.2-	15.7-	0.82	1.75
15	15	TRANSCON LINES, EL SEGUNDO, CA	CMGF	343553	332933	2317	0.7	5.4	1.20	0.41
16	11	ANCHOR MOTOR FREIGHT INC, BIRMINGHAM, MI	CTMV	324547	302261	5968	1.8	9.9	0.86	0.57
17	18	PRESTON TRUCKING CO INC, PRESTON, MD	CMGF	320626	309936	5197	1.6	5.2	1.63	0.16
18	16	MAYFLOWER TRST INC, CARMEL, IN	CMHG	311951	303111	4754	1.5	11.1	1.18	0.00
19	17	AMERICAN FRT SYSTEM INC, OVERLAND PARK, KS	CMGF	300569	293796	4116	1.4	13.0	0.67	0.11
20	21	ST JOHNSBURY TRKG CO INC, HOLLISTON, MA	CMGF	260171	234910	10135	3.9	25.0	0.77	0.11
21	19	COMPLETE AUTO TRANSIT INC, BLOOMFIELD HILLS, MI	CTMV	241693	220730	11505	4.8	19.3	1.34	0.56
22	20	CENTRAL TRANSPORT INC, STERLING HEIGHTS, MI	CMGF	240296	232181	8816	3.7	13.0	1.16	0.04
23	22	SIGNAL DLVY SERVICE INC, DOWNERS GROVE, IL	CTRS	218446	200645	8181	3.7	15.4	1.09	0.43
24	NR	• SCHNEIDER TRANSPORT INC, GREEN BAY, WI	CMSC	205277	201089	2543	1.2	30.4	1.17	0.00
25	37	J B HUNT TRANSPORT INC, LOWELL, AR	CMGF	203786	156844	24738	12.1	38.7	1.68	1.15
26	24	MATLACK INC, WILMINGTON, DE	CMLP	203265	197747	119	0.1	0.3-	1.55	1.67
27	23	BEKINS VAN LINES CO, HILLSIDE, IL	CMHG	201815	199733	1510	0.7	4.4	1.63	0.07
28	25	CENTRAL FREIGHT LNS INC, WACO, TX	CMGF	195811	187406	4588	2.3	4.7	1.85	0.33
29	27	BROWN TRANSPORT CORP, ELBERTON, GA	CMGF	189710	178758	5234	2.8	38.3	1.73	3.05
30	34	CHEMICAL LEAMAN TANK LNS, EXTON, PA	CMLP	184527	176996	3157	1.7	9.4	1.09	1.01
31	29	COMMERCIAL CARRIERS INC, SOUTHFIELD, MI	CMMV	182935	169444	6873	3.8	19.4	0.63	0.46
32	28	PILOT FREIGHT CARRIERS INC, WINSTON-SALEM, NC	CMGF	181117	185685	7431-	4.1-	N.V.	0.90	N.V.
33	33	ATLAS VAN LINES INC, EVANSVILLE, IN	CMHG	180038	167883	15	0.0	1.6	0.69	3.88
34	31	BOWMAN TRPTN INC, ATLANTA, GA	CMGF	179776	174753	1814	1.0	3.7	1.97	0.04
35	30	JONES TRUCK LINES INC, SPRINGDALE, AR	CMGF	176201	162982	6208	3.5	8.8	1.21	0.00
36	38	VIKING FREIGHT SYSTEM INC, SAN JOSE, CA	CMGF	170885	160418	4699	2.7	10.3	1.77	0.49
37	36	THURSTON MOTOR LINES INC, CHARLOTTE, NC	CMGF	143703	144079	1377-	1.0-	5.8-	2.22	1.17
38	43	NU-CAR CARRIERS INC, BRYN MAWR, PA	CMMV	133719	126070	2412	1.8	18.0	0.24-	0.00
39	50	NATIONAL FREIGHT INC, VINELAND, NJ	CMGF	132942	127846	1728	1.3	8.9	1.38	3.12
40	39	RYDER FREIGHT SYSTEM INC, SALT LAKE CITY, UT	CMGF	129536	135727	3920-	3.0-	9.8-	1.33	0.12
41	42	WATKINS MOTOR LINES INC, LAKELAND, FL	CMGF	126193	120945	1946	1.5	11.1	1.84	0.07
42	52	MILNE TRUCK LINES INC, PLEASANTON, CA	CMGF	125863	121953	1056	0.8	3.7	0.91	0.06
43	48	HOLLAND MOTOR EXP INC, HOLLAND, MI	CMGF	124126	108498	9191	7.4	22.9	1.54	0.01
44	70	D P D INC, MIAMI, FL	CTSC	121833	118587	141-	0.1-	1.8-	1.22	1.56
45	49	THE MOTOR CONVOY INC, DECATUR, GA	CMMV	119561	117725	1093	0.9	16.2	1.02	0.44
46	41	C W TRANSPORT INC, WISCONSIN RAPIDS, WI	CMGF	117085	116112	521	0.4	0.3	1.20	0.15
47	44	TRI-STATE MTR TRANSIT CO, JOPLIN, MO	CMHM	115736	110318	4429	3.8	14.2	1.95	0.60
48	46	RED STAR EXP LNS-AUBURN INC, AUBURN, NY	CMGF	111559	100743	8618	7.7	21.4	1.56	0.12
49	57	NORTHWEST TRPT SVC INC, COMMERCE CITY, CO	CMGF	110424	96412	8134	7.4	19.9	2.80	0.00
50	53	A-P-A TRANSPORT CORP, NORTH BERGEN, NJ	CMGF	108618	95257	25509	23.5	98.4	1.37	0.70
		Totals for Top 50		23140343	21510510	873831	3.8	17.2	1.17	0.25

TOTAL TOP 50 – 1986	$23,140,343	$21,510,510	$873,831
TOTAL TOP 50 – 1985	21,310,892	20,036,691	683,844
TOTAL TOP 50 – 1984	20,936,173	19,750,700	677,193

33075	4831	23743	61649	178	$30397	$81037	$3704	$85459	$38138	$95353	$334088	$0.32*	$24486	$45857	$75
12754	1886	4437	19077	40	9522	27455	1353	32597	9141	42357	122425		10255	17681	29
383	7997	26610	34990	112	14192	54276	1941	21232	11735	38801	142177	0.29	10098	26144	42
507	8170	22193	30870	12	8485	44276	1205	10380	19078	23741	107166	0.26	8291	18358	100
168	7086	23799	31053	0	14788	47484	1716	22814	13716	33744	134262	0.30	9256	28829	1886
0	395	8397	8792	8258	1807	764	NA	1	5768	392	8731	N.V.	47	89	417
520	3674	12500	16694	0	6218	26593	899	9838	12845	9095	65487	0.32	6736	11029	0
163	4016	9532	13711	0	6756	22248	1034	13480	4642	10709	58869	0.30	4130	9385	180
135	2242	10620	12997	476	2534	19218	863	5117	5781	4869	38382	0.22	4451	6314	168
141	2569	7896	10606	186	4624	12392	648	6243	3327	8439	35674	0.32	6467	5382	38
0	0	178	178	5028	78	0	NA	0	219	566	864	N.V.	0	187	0
159	2739	9299	12197	86	3362	13346	685	5721	7367	4493	34974	0.38	4343	4999	20
0	79	328	407	6161	217	0	NA	0	444	326	987	N.V.	60	156	0
262	2181	4285	6728	390	3503	12502	596	5403	1854	5282	29140	0.24	2538	5692	0
110	1330	4097	5537	0	2403	11497	447	4508	3792	6621	29268	0.30	3248	5148	390
0	3203	3170	6373	0	6421	23550	601	8166	4528	5231	48497	0.35	5856	6449	4
39	2022	5323	7384	0	4070	9227	617	5894	2215	8302	30324	0.41	3929	3059	0
0	0	1406	1406	3410	72	36	NA	549	722	616	1994	N.V.	5244	684	0
51	1396	5823	7270	90	2451	8818	448	4584	2913	2915	22129	0.26	1024	3691	0
1	571	867	1439	994	3165	6708	428	2616	2097	4553	19567	0.39	2061	2678	0
1901	0	1983	3884	0	4590	12298	440	6665	3407	8501	35901	0.37	3745	4742	11
0	0	0	0	760	5	64	0	1	3	1275	1347	N.V.	2815	1660	0
12	1576	8094	9682	0	4520	12349	362	3897	2654	1687	25469	N.V.	1769	0	411
0	0	0	0	537	NA	NA	NA	NA	NA	NA	17876	N.V.	NA	NA	NA
0	2527	3743	6270	0	5217	18329	522	991	1045	3689	29794	0.14	5795	315	12
49	876	3339	4264	625	2990	7586	316	5018	4666	12682	33257	0.46	3814	422	0
0	1	835	836	0	730	0	NA	0	980	577	2286	N.V.	0	0	0
924	1594	4161	6679	0	2190	6792	150	4229	393	2992	16745	0.30	3159	2211	0
214	1326	3403	4943	0	1935	7577	405	2629	2190	3335	18071	0.29	1408	2865	51
0	634	3018	3652	842	3228	6939	307	3720	3346	7434	24975	0.36	5255	555	987
0	1326	1516	2842	330	3019	9063	520	4358	4154	4592	25707	0.33	3108	6105	0
51	677	1963	2691	461	1370	5902	318	3207	2961	3701	17459	0.33	1941	1512	0
0	0	135	135	3004	142	3	NA	0	317	144	606	N.V.	278	1151	2
202	1151	3475	4828	376	3418	6828	319	3083	2288	2610	18546	0.33	1953	2087	0
0	1176	3349	4525	0	1627	5246	266	1647	691	3463	12941	0.24	1747	1562	0
36	539	2465	3040	0	518	4302	202	2848	622	1207	9699	0.23	4421	2137	410
298	675	2784	3757	159	1709	5909	272	3152	823	2713	14578	0.28	1460	2898	0
0	811	927	1738	171	2045	6229	149	4282	1766	4150	18620	0.39	1630	4752	9
0	1162	3717	4879	1124	4038	2283	185	773	2321	2080	11679	N.V.	1688	377	0
0	4	798	802	1471	2142	2713	13	1510	1108	3557	11042	0.62	5462	1031	1612
18	186	70	274	358	935	1558	57	942	1471	1795	6759	0.37	3424	1220	320
92	570	1804	2466	45	1032	3476	152	1532	1671	1657	9522	0.35	1125	1447	0
7	632	1174	1813	0	1141	3690	478	2023	1827	1941	11100	0.40	1196	736	58
86	27	164	277	850	211	8036	10	1370	570	835	11034	0.19	2626	271	778
0	108	112	220	767	1849	7089	227	3010	2345	2591	17111	0.38	1779	3883	0
15	758	2740	3513	177	1287	4087	189	1859	533	2415	10371	0.35	1857	1204	26
20	236	2112	2368	886	1846	1448	117	1391	235	3062	8100	0.71	5516	1022	1159
129	547	1152	1828	0	1137	2743	88	1534	621	3024	9148	0.65	693	741	21
0	0	0	0	682	634	3061	135	969	1674	1740	8213	0.28	459	562	640
387	277	953	1617	0	875	2064	257	1496	707	2654	8054	0.55	1474	1431	101
52909	75783	244489	373181	39046	181445	579091	23641	312738	197711	398508	1711015	0.25	184117	250710	9957

* = Combined totals for UPS-Illinois and UPS-New York
• (before carrier name) = carrier data based on quarterly report, state report, or information provided directly to ATA
NA = Not applicable or not available
N.V. = Not valid (eg., negative income divided by negative equity, or low maintenance cost per mile)
T = Tie on operating ratio for 1986
Maintenance cost per mile = Total maintenance expense divided by sum of vehicle miles in owned vehicles + vehicles rented without driver.

1384417*	0	30019*	0	NA	$2.74*	0	11846*	NA	NA	NA	89.4	89.0	13	UPS-III
											93.2	92.6	34	UPS-NY
489340	71	0	16222	1194	1.07	1154	4812	135	12742	14.0	91.5	93.1	19	Yellow
419549	1249	0	28873	1163	1.19	1423	4363	148	11802	15.1	90.3	91.0	16	Roadway
444933	11547	0	17746	1379	1.17	1525	4072	154	10452	16.3	92.1	92.9	23	CF
0	159940	0	0	1151	1.96	683	NA	291	NA	4.9	97.1	97.8	66	North American
207395	0	0	14153	1224	1.14	668	1863	74	4752	14.0	99.1	112.3	85	P*I*E
197436	0	0	0	587	0.80	1375	2350	118	5516	11.1	84.0	84.8	4	Overnite
174540	49	0	811	1146	0.96	646	1579	66	3556	14.5	94.1	95.6	39	A B F
111792	21743	297	16980	641	1.16	1090	1678	86	3954	11.3	92.5	92.7	27	Carolina
0	122496	0	0	1198	2.24	589	NA	229	NA	5.8	99.1	99.1	86	United
85747	0	6306	18600	488	1.41	1103	1630	89	4114	12.0	99.9	101.7	93	ANR
0	128302	0	0	990	2.17	617	NA	249	NA	4.8	100.1	99.8	94	Allied
70350	0	48969	0	803	1.03	694	1317	63	3152	13.2	99.2	102.5	89	Smith's
98951	42501	0	419	1274	1.01	1007	816	91	2099	16.4	96.9	97.1	65	Transcon
137831	0	1889	0	291	1.51	4142	NA	NA	NA	8.6	93.1	92.1	33	Anchor
66380	577	8391	9534	435	1.28	907	1392	81	3143	11.3	96.7	98.4	63	Preston
0	121655	0	0	1228	1.64	480	NA	180	NA	4.8	97.2	95.8	67	Mayflower
67151	1133	17803	3447	637	1.15	590	1175	48	2826	12.6	97.7	98.7	74	American Frt
0	0	49858	0	302	1.04	494	1163	44	3142	10.0	90.3	92.5	14	St Johnsbury
96191	9583	0	0	333	1.66	2347	NA	NA	NA	7.4	91.3	90.9	18	Complete Auto
0	2851	111630	0	160	1.19	2905	1338	231	2078	5.9	96.6	96.7	62	Central Trpt
NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	91.9	93.0	20	Signal Dlvy
NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	98.0	NA	75	Schneider
217489	0	0	0	1078	0.64	2857	NA	NA	NA	14.2	77.0	79.8	1	J B Hunt
69273	33149	3285	0	180	1.55	8004	NA	NA	NA	13.7	97.3	101.6	69	Matlack
0	66858	0	0	1080	2.08	293	NA	165	NA	4.7	99.0	99.2	84	Bekins
55098	0	0	391	203	0.95	1204	1183	80	3211	8.7	95.7	97.5	53	Central Frt
62713	30135	0	0	477	0.86	1767	663	121	1360	12.5	94.2	98.6	40	Brown
67425	31544	1452	0	225	1.45	6145	NA	NA	NA	13.7	95.9	97.4	56	Chemical Leaman
72704	6167	4112	0	170	1.77	3106	NA	NA	NA	6.4	92.6	94.3	28	Commercial Carriers
52784	82	0	805	551	1.08	385	778	38	1740	12.0	102.5	106.6	96	Pilot
70	61054	0	0	1073	2.00	284	NA	95	NA	5.0	93.2	94.5	T 35	Atlas
56789	32140	0	1307	715	0.90	1307	585	85	1402	14.9	97.2	99.8	68	Bowman
54691	0	0	91	254	0.90	252	904	27	2050	5.3	92.5	93.9	26	Jones Truck
41799	0	0	0	366	1.02	252	600	25	2077	7.5	93.9	94.5	38	Viking
51521	0	0	0	466	0.87	662	649	54	1461	11.9	100.3	101.3	95	Thurston
41794	0	5577	0	178	2.17	2483	NA	NA	NA	9.3	94.3	95.1	41	Nu-Car
10066	73268	0	0	318	1.29	818	147	161	40	3.7	96.2	98.6	60	National Frt
0	112549	17887	0	1176	0.82	1446	NA	NA	NA	13.0	104.8	103.0	98	Ryder
18435	39988	0	0	1546	0.86	134	327	14	693	12.2	95.8	93.7	54	Watkins
26598	5320	537	3586	657	1.19	259	484	27	1272	13.6	96.9	99.3	64	Milne
28016	0	0	0	213	1.10	275	773	31	1433	8.0	87.4	88.3	7	Holland
0	0	59362	0	N.V.	1.74	1232	NA	NA	NA	N.V.	97.3	86.8	70	D P D
3767	0	41450	0	13	1.90	4482	NA	NA	NA	1.2	98.5	99.0	82	Motor Convoy
25236	530	4386	286	374	1.39	351	602	35	976	11.5	99.2	99.6	87	CW
11454	78040	0	0	1108	1.04	891	NA	NA	NA	11.0	95.3	100.4	48	Tri-State
14114	107	0	0	200	1.32	98	502	12	1321	8.4	90.3	89.9	15	Red Star
0	2705	29836	1033	1066	1.12	237	298	19	663	16.9	87.3	86.6	6	Northwest
14744	0	0	0	207	0.86	84	418	8	1350	7.0	87.7	83.8	8	A-P-A
5048583	1197333	443046	134284	618	1.57	63747	50307	3374	94377	11.6	93.0	93.8		

For Top 100 listings under "Type": BM – building materials; CM – common; CT – contracts; GF – general freight; ED – explosives/dangerous articles; FP – forest products; HG – household goods; HM – heavy machinery; LP – liquid petroleum products (including, in most cases, other bulk commodities); MV – motor vehicles; RS – retail store delivery; SC – specific commodity not otherwise grouped

51	54	M & G CONVOY INC, BUFFALO, NY	CMMV	$106691	$101370	$3589	3.4	22.1	0.66	0.78
52	47	BUILDERS TRANSPORT INC, CAMDEN, SC	CTBM	106407	98065	693	0.7	2.4	1.25	2.93
53	45	OLD DOMINION FRT LINE INC, HIGH POINT, NC	CMGF	104499	104079	2864-	2.7-	28.2-	0.98	2.41
54	40	JACK COOPER TRPT CO INC, OKLAHOMA CITY, OK	CMMV	103177	98898	159	0.2	1.1	0.72	1.22
55	56	OVERLAND EXPRESS INC, INDIANAPOLIS, IN	CMGF	99385	111355	16119-	16.2-	1338.9-	0.25	14.80
56	61	CHURCHILL TRUCK LINES INC, CHILLICOTHE, MO	CMGF	97528	92462	2812	2.9	15.4	1.47	0.08
57	60	TRANSUS INC, ATLANTA, GA	CMGF	96514	94865	1149	1.2	10.3	2.13	0.04
58	72	WERNER ENTERPRISES INC, OMAHA, NE	CMBM	94410	76238	9020	9.6	16.6	1.02	0.22
59	63	• E & L TRANSPORT CO, DEARBORN, MI	CMMV	93193	91339	936	1.0	12.4	1.09	0.00
60	NR	KOCH SERVICE INC, WICHITA, KS	CMLP	91158	80849	5258	5.8	13.8	1.93	0.00
61	64	F F E TRPTN SVCS INC, DALLAS, TX	CMRC	90066	88572	750	0.8	10.4	1.98	1.00
62	62	BURNHAM SERVICE CO INC, COLUMBUS, GA	CMHG	89487	78765	4844	5.4	16.9	3.56	1.07
63	58	PACIFIC MTR TRKG CO, BURLINGAME, CA	CMGF	88797	85205	13225-	14.9-	N.V.	0.87	N.V.
64	68	SOUTHEASTERN FRT LNS INC, COLUMBIA, SC	CMGF	88603	78896	9227	10.4	44.8	1.38	0.17
65	71	NEW PENN MTR EXPRESS INC, LEBANON, PA	CMGF	84765	69360	8774	10.4	20.9	1.25	0.05
66	55	JONES MOTOR CO INC, SPRING CITY, PA	CMGF	83270	81737	1716	2.1	26.3	1.71	0.02
67	65	CRETE CARRIER CORP, LINCOLN, NE	CMGF	80295	77087	2548	3.2	12.9	3.20	0.00
68	59	MERCHANTS FAST MTR LINES, ABILENE, TX	CMGF	79562	82577	1628-	2.0-	15.3-	1.79	0.00
69	51	MIDWESTERN DISTB INC, FORT SCOTT, KS	CMSC	79245	85228	5732-	7.2-	193.4-	0.31-	0.02
70	73	AAA COOPER TRPTN, DOTHAN, AL	CMGF	77816	68394	4530	5.8	17.9	0.70	0.26
71	81	CONTRACT FREIGHTERS INC, JOPLIN, MO	CMSC	73755	66832	3603	4.9	38.2	1.03	2.10
72	69	PENNSYLVANIA TRK LNS INC, WYNNEWOOD, PA	CMGF	73529	69892	1295	1.8	15.6	1.39	2.59
73	85	ESTES EXPRESS LINES, RICHMOND, VA	CMGF	72570	61470	5926	8.2	21.8	2.15	0.05
74	86	• SOUTHWEST MOTOR FREIGHT, CHATTANOOGA, TN	CMGF	71097	65481	540	0.8	92.3	1.36	61.61
75	99	• ANDERSON TRUCKING SVC INC, ST CLOUD, MN	CMSC	71032	68249	1343	1.9	8.7	1.26	0.26
76	80	JONES TRANSFER COMPANY, MONROE, MI	CMGF	70777	69815	139	0.2	1.1	0.71	0.05
77	88	DART TRANSIT COMPANY, ST PAUL, MN	CMGF	70434	65590	2829	4.0	29.9	1.32	1.54
78	79	MIDWEST COAST TRPT INC, SIOUX FALLS, SD	CMRC	69219	66761	1410	2.0	16.2	1.74	0.30
79	84	AUTO CONVOY CO, DALLAS, TX	CMMV	68159	67093	89	0.1	16.1	0.82	1.01
80	78	ADVANCE TRANSPORTATION CO, MILWAUKEE, WI	CMGF	67864	64928	1433	2.1	24.9	0.74	1.63
81	82	CASSENS TRANSPORT CO, EDWARDSVILLE, IL	CMMV	67696	64693	2025	3.0	43.1	1.15	0.00
82	95	• STOOPS EXPRESS INC, ANDERSON, IN	CMSC	66187	62878	2152	3.3	10.2	2.18	0.44
83	83	PAULS TRUCKING CORP, AVENEL, NJ	CTSC	65957	61364	4495	6.8	54.8	0.66	0.00
84	94	MILLER TRANSPORTERS INC, JACKSON, MS	CMLP	63526	60016	1904	3.0	22.5	1.32	0.77
85	103	WILLIG FREIGHT LINES, SAN FRANCISCO, CA	CMGF	62616	58147	2836	4.5	22.8	1.30	0.88
86	109	NATIONAL CARRIERS INC, LIBERAL, KS	CMRC	62025	59248	1897	3.1	25.4	1.75	0.00
87	91	HYMAN FREIGHTWAYS INC, ST PAUL, MN	CMGF	61891	61387	156	0.3	4.0	0.96	0.66
88	115	CONVOY COMPANY, PORTLAND, OR	CMMV	61889	58798	1536	2.5	13.1	0.99	0.21
89	93	HOLMES TRANSPORTATION INC, FRAMINGHAM, MA	CMGF	61283	60209	2634	4.3	16.1	1.81	0.11
90	130	• ECK MILLER TRPTN CORP, ROCKPORT, IN	CMGF	61133	59665	1197	2.0	23.0	0.76	0.10
91	100	LYONS TRPTN LINES INC, ERIE, PA	CMGF	60833	60529	235	0.4	1.9	2.14	0.30
92	89	GROENDYKE TRANSPORT INC, ENID, OK	CMLP	60272	58703	913	1.5	236.4	0.82	19.29
93	87	JANESVILLE AUTO TRPT CO, BLOOMFIELD HILLS, MI	CTMV	58677	53963	3137	5.3	16.7	0.61	0.04
94	123	REFINERS TRPT & TERM CORP, CLEVELAND, OH	CMLP	58289	56797	227	0.4	1.7	1.50	0.57
95	NR	K L L M INC, JACKSON, MS	CMGF	58066	53630	2334	4.0	11.3	1.06	0.48
96	121	WHITEFORD TRUCK LINES INC, SOUTH BEND, IN	CMGF	57679	57610	255-	0.4-	N.V.	0.75	N.V.
97	133	MISSOURI NEBRASKA EXP INC, ST JOSEPH, MO	CMGF	57164	53625	1452	2.5	10.8	2.72	0.60
98	92	MERCER TRANSPORTATION CO, LOUISVILLE, KY	CMBM	57071	54493	2519	4.4	36.0	4.32	0.05
99	NR	COUNTRY WIDE TRUCK SVC, CUCAMONGA, CA	CMGF	56583	52613	1308	2.3	33.8	0.82	3.05
100	105	• CARRETTA TRUCKING INC, PARAMUS, NJ	CMGF	56509	52693	1638	2.9	14.9	1.05	1.02
		Totals for Top 100		26898993	25083023	943215	3.5	16.7	1.17	0.29

TOTAL TOP 100 – 1986	$26,898,993	$25,083,023	$943,215
TOTAL TOP 100 – 1985	25,016,054	23,594,793	734,023
TOTAL TOP 100 – 1984	24,613,472	23,268,398	782,831

0	1033	1185	2218	90	$1921	$4488	$294	$3064	$979	$3948	$14694	$0.44	$2765	$4191	
1104	0	2674	3778	350	2222	10041	230	2239	719	1990	17440	0.17	6045	357	0
17	519	1847	2383	220	1646	3196	229	1909	1549	2864	11393	0.41	3364	2260	21
0	1197	1279	2476	0	3468	6582	215	5749	1062	3490	20566	0.39	2425	2034	0
0	395	1503	1898	568	988	14111	356	1189	746	1209	18600	0.20	4115	0	0
49	729	1431	2209	0	1051	3357	158	1982	2697	1408	10653	0.42	424	929	0
93	611	1482	2186	240	1112	2436	114	2208	2044	1498	9413	0.69	1919	1154	58
0	807	1917	2724	114	841	8054	303	1872	985	932	12987	0.17	3033	541	202
NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	13485	0.41	NA	NA	NA
0	829	1100	1929	10	2495	6174	962	6529	0	735	16895	0.35	829	829	0
0	0	291	291	591	1059	570	0	0	1960	2145	5734	N.V.	2307	948	446
215	228	528	971	368	1018	3534	NA	0	3895	790	9236	0.18	911	154	129
277	60	325	662	210	1163	3419	122	833	1541	2796	9874	0.47	914	1472	0
85	752	1331	2168	4	1442	3055	121	2326	707	623	8274	0.29	1005	962	121
52	439	1056	1547	0	986	2205	85	1468	847	1800	7392	0.53	1244	614	0
0	0	1	1	920	0	0	0	0	3	37	40	N.V.	2399	57	0
0	4	710	714	799	659	24	0	282	102	635	1702	N.V.	1474	551	443
0	0	0	0	310	1168	2991	132	1037	1040	408	6775	0.27	1638	612	0
0	0	30	30	622	704	0	0	0	483	552	1739	N.V.	5619	514	1942
68	579	1310	1957	87	1382	2494	100	828	362	641	5808	0.30	1172	759	112
0	280	908	1188	378	1044	3017	86	721	337	1745	6949	0.10	1550	259	719
2	200	3	205	0	662	1814	143	5028	1174	1061	9882	N.V.	938	179	124
68	697	1655	2420	0	1230	2738	132	1638	143	670	6551	0.40	1011	370	6
NA	NA	NA	NA	NA	697	6144	148	430	1123	1614	10154	N.V.	0	568	2170
NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	5619	N.V.	NA	NA	NA
12	465	2120	2597	28	751	2456	138	1879	839	2201	8265	0.34	1259	329	90
3	0	1294	1297	762	1334	2	1	204	1271	1932	4745	N.V.	2413	368	384
0	3	623	626	566	205	53	0	0	386	254	897	0.01	1995	135	5
243	0	273	516	540	1263	4322	168	1891	1783	1284	10711	0.31	1453	2499	0
10	252	629	891	291	256	1776	79	952	657	951	4671	0.33	1117	919	243
0	135	55	190	478	1208	3581	301	2119	871	2205	10285	0.32	1000	1808	0
NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	11408	N.V.	NA	NA	NA
0	178	471	649	109	889	2682	62	1011	581	4006	9231	0.40	340	100	0
0	516	688	1204	95	912	3132	163	2320	326	2553	9407	0.29	2626	34	20
105	382	999	1486	0	696	2321	105	1482	1162	915	6681	0.44	364	525	388
0	5	519	524	455	579	345	33	634	220	444	2255	N.V.	1820	67	66
-	352	1693	2086	0	324	1071	75	796	871	114	3251	0.18	420	797	1
493	0	530	1023	0	721	3465	188	2429	1181	567	8551	0.28	842	2314	159
36	395	1029	1460	70	431	1644	88	1002	288	1417	4869	0.29	679	620	62
NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	467	N.V.	NA	NA	NA
2	221	692	915	0	523	1960	80	814	892	1218	5487	0.38	601	833	16
0	391	661	1052	223	1157	2674	101	1112	1037	1330	7411	0.16	6969	131	93
438	0	461	899	0	724	2927	112	1344	483	1259	6848	0.30	568	1217	1
1	306	654	961	28	1007	3426	81	1295	1225	335	7368	0.29	912	196	110
0	265	595	860	121	1272	6047	155	785	813	3766	12838	0.35	1612	363	0
NA	NA	NA	NA	NA	739	27	0	78	511	1516	2871	N.V.	1584	250	0
0	0	949	949	490	365	0	0	85	148	294	892	N.V.	814	60	93
0	0	3	3	410	0	0	0	0	0	280	280	N.V.	2033	222	7
NA	NA	NA	NA	NA	596	3296	65	400	841	743	5941	0.33	1506	516	413
NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	7285	0.20	NA	NA	NA
56323	89008	281993	427324	49593	226355	716742	29566	376702	238595	461683	2105785	0.29	264145	285327	18375

NA = Not applicable or not available.
N.V. = Not valid (e.g. negative income divided by negative equity, or low maintenance cost for high mileage).
* = combined totals for UPS-Illinois and UPS-New York
T = Tie and operating ratio for 1985
Maintenance cost per mile = total maintenance expense divided by sum of vehicle miles in owned vehicles + vehicles rented without driver

33521	4503	0	0	179	$2.27	1325	NA	NA	NA	6.2	95.0	96.5	46	M & G
103548	0	0	0	479	0.82	3068	NA	NA	NA	14.2	92.2	86.9	24	Builders
28001	15540	95	0	316	0.96	541	440	43	895	7.1	99.6	99.3	91	Old Dominion
52808	7	0	0	373	1.53	1363	NA	NA	NA	9.6	95.9	89.0	55	Jack Cooper
92582	3023	0	33	759	0.73	1890	0	126	0	15.0	112.0	96.5	100	Overland
25353	3175	0	1388	549	1.07	171	399	16	834	10.4	94.8	96.2	43	Churchill
13706	17729	0	3639	391	0.99	403	462	32	1108	7.7	98.3	98.5	79	Transus
70507	15081	6053	0	NA	0.78	0	NA	NA	NA	NA	80.8	83.0	2	Werner
0	0	32552	0	NA	NA	1120	NA	NA	NA	NA	98.0	96.0	76	E & L
48954	0	0	0	NA	NA	NA	NA	NA	NA	NA	88.7	84.1	11	Koch
0	42510	0	0	NA	1.59	959	NA	NA	NA	NA	98.3	101.1	80	F F E
52681	44070	0	0	1352	0.44	182	NA	84	NA	2.5	88.0	90.0	10	Burnham
9566	0	11554	0	234	2.20	1003	NA	NA	NA	11.1	96.0	99.2	57	Pacific Motor
28691	795	0	0	239	0.51	303	594	31	1336	7.3	89.0	89.6	12	Southeastern
13905	0	0	0	224	1.50	190	447	18	966	10.3	81.8	82.9	3	New Penn
0	16866	43496	0	517	1.17	1644	NA	NA	NA	14.1	98.2	98.1	77	Jones Motor
0	82615	0	0	1121	0.89	1474	0	74	0	20.0	96.0	95.8	58	Crete
0	0	25513	0	321	1.13	564	402	36	939	12.2	103.8	98.8	97	Merchant's Fast
0	73488	0	0	972	1.00	1148	NA	NA	NA	15.2	107.6	110.0	99	Midwestern
19672	0	0	1457	254	0.93	180	468	16	1114	7.7	87.9	89.2	9	AAA Cooper
19842	0	48679	0	672	0.68	1214	NA	NA	NA	11.9	90.6	94.4	17	Contract Freighters
NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	95.1	95.0	47	Pennsylvania
16211	0	0	0	190	1.00	312	479	25	1150	9.3	84.7	87.7	5	Estes
NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	92.1	94.4	22	Southwest
NA	NA	NA	NA	NA	NA	960	NA	NA	NA	NA	96.1	95.5	59	Anderson
22764	179	1649	0	168	1.01	987	357	80	504	9.2	98.6	97.3	83	Jones Transfer
0	58777	0	0	621	1.02	1088	NA	NA	NA	11.5	93.1	94.3	32	Dart
0	0	71012	0	1590	0.88	773	NA	NA	NA	17.3	96.4	96.0	61	Midwest
28304	0	6297	0	229	1.49	1132	NA	NA	NA	7.5	98.4	99.8	81	Auto Convoy
3562	184	10683	0	229	1.30	231	370	19	803	9.5	95.7	97.7	52	Advance
4733	0	27598	0	333	1.61	822	NA	NA	NA	8.5	95.6	99.6	51	Cassens
NA	NA	NA	NA	NA	NA	823	NA	NA	NA	NA	95.0	94.0	T 44	Stoops
13499	0	9775	0	304	2.05	1777	NA	NA	NA	23.2	93.0	101.2	31	Pauls
32284	8072	0	0	156	1.27	3734	NA	NA	NA	14.4	94.5	98.1	42	Miller
15132	275	44	0	431	1.32	186	310	18	610	13.8	92.9	95.0	29	Willig
58	55273	0	0	849	0.99	875	NA	NA	NA	13.4	95.5	94.6	50	National Carriers
9053	577	8670	742	408	1.17	226	260	17	599	10.4	99.2	98.7	88	Hyman
30258	306	0	0	200	1.64	676	NA	NA	NA	4.4	95.0	95.1	T 44	Convoy
16174	236	859	0	199	0.76	124	327	11	866	5.2	98.2	98.7	78	Holmes
447	0	51780	0	NA	0.96	1318	NA	NA	NA	NA	97.6	97.5	73	Eck Miller
14302	0	0	0	313	1.22	103	301	11	620	8.8	99.5	99.3	90	Lyons
27757	273	17916	0	168	1.11	3532	NA	NA	NA	12.9	97.4	98.9	71	Groendyke
22984	2735	0	0	381	1.66	1161	NA	NA	NA	17.2	92.0	91.3	21	Janesville
25628	3495	0	0	6	1.36	71135	NA	NA	NA	13.5	97.4	96.1	72	Refiners
37108	19920	0	0	1306	0.80	873	NA	NA	NA	20.0	92.4	94.8	25	K L L M
NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	99.9	102.4	92	Whiteford
0	54714	0	0	1297	0.87	608	NA	NA	NA	14.4	93.8	96.4	37	Missouri Nebraska
0	48512	0	0	913	0.96	1011	NA	NA	NA	19.0	95.5	96.8	49	Mercer
18001	36286	0	0	1581	0.85	481	NA	NA	NA	14.0	93.0	95.7	30	Country Wide
37308	3022	0	0	NA	0.95	1922	0	53	0	NA	93.2	92.1	T 35	Carretta
6037487	1809571	817271	141543	388	1.45	179359	55923	4084	106721	11.8	93.2	94.0		

For Top 100 listings under "Type": BM – building materials; CM – common; CT – contracts; GF – general freight; ED – explosives/dangerous articles; FP – forest products; HG – household goods; HM – heavy machinery; LP – liquid petroleum products (including, in most cases, other bulk commodities); MV – motor vehicles; RS – retail store delivery; SC – specific commodity not otherwise grouped

In-Time Inventory Delivery Systems, Detroit; and TNT Tranasall, a TL carrier also headquartered in Winston-Salem, N.C. TNT also has extensive holdings in Canada, in addition to operating 46,152 marine containers and a fleet of 68 vessels. In March 1987, it was announced that TNT Express would consolidate with Right-O-Way, a domestic and international freight forwarder that is also licensed by the ICC as a truck brokerage providing truckload services.

Other carriers reporting losses include two Ryder System subsidiaries. They are Ryder Freight System of Salt Lake City, Ut., formerly known as Interstate Contract Carrier Corp., and DPD, Inc., of Miami, Fla. Ryder Freight lost $3.9 million based on revenues of $129.5 million in 1986. While it was known as Interstate Contract, the company lost $1.2 million in 1985. DPD, Inc., which went from 114 in 1984 to 70 in 1985, jumped to 44 in 1986 in Top 100 ranking but on losses of $141,000. In 1985, the company reported net earnings of $39,000. Both DPD and Ryder Freight reported increased revenues in 1986, but the potential for profitability was eroded by increased expenses that resulted from their rapid growth.

Another carrier reporting more red ink for 1986 was Smith's Transfer Corp. of Staunton, Va. In 1986, Smith's reported losses of $4.3 million, added to 1985 losses of $7.9 million. Smith's is owned by ARA of Philadelphia, Pa., a food service company. ARA also owns Cooper Motor Lines, Greenville, S.C.

Whiteford Truck Lines is part of the Whiteford System, a holding company with several trucking operations, a leasing business and three truck dealerships. In early 1986, Whiteford acquired Wagoner Transportation of South Bend, Ind., a dry freight and refrigerated operator. Also acquired was B.A. Peters & Sons, Benton Harbor, Mich., a NationaLease affiliate with a small trucking subsidiary.

Overland Express of Indianapolis, Ind., ranked 56 in 1985 does not appear in this year's Top 100. The company announced a 416.2 million loss in 1986 on revenues of $99.4 million. A truckload operator, Overland was acquired in 1986 by Continental Training Services, Inc., a truck driver training school, which has arranged a $5 million credit line for Overland in exchange for 28.8% of the company's outstanding stock.

This year's analysis of the Top 100 would be incomplete without mentioning P.I.E., of Jacksonville, Fla. Taking 1985 into consideration, the company began 1986 down $116.4 million after eight quarters of operation. The company's return on equity was a negative 436.7%.

P.I.E. reported 1986 profits of $4.1 million on revenues of $660 million, and the company's return on equity, while still negative, shrank to 9.8%.

Despite this modest profit, the company is not out of the financial woods. P.I.E. chairman and CEO Kinzey Reeves said the company actually had a net loss of $2 million, but was able to still show a profit based on an extraordinary gain of $8 million achieved through a change in accounting procedures for its employee pension plan.

Since 1985, 82% of P.I.E.'s 11,000 employees have signed on as shareholders, exchanging 15% in gross wages for 38% in company stock. The Employee Stock Ownership Plan (ESOP) has been cited as a major reason for the balance sheet improvements.

Another carrier able to dig out profits from financial losses in 1985 is Matlack Inc., Lansdowne, Pa., the nation's biggest bulk carrier. Matlack reported net profits of $119,000 on revenues of $203.2 million for 1986. In 1985, Matlack lost $5.1 million on revenues of $200.2 million.

Chemical Leaman Tank Lines, Exton, Pa., improved its profitability in 1986, reporting net profits of $3.1 million on revenues of $184.5 million. In '85, Chemical Leaman earned $1.4 million. It acquired Coastal Tank Lines of Akron, Oh., in 1986, which in 1985 reported a loss of $92,000. Chemical Leaman chairman S.F. Niness, Jr., said there was a smooth transition of the assets of Coastal Tank Lines which "helped to contribute to Chemical's strong third quarter earnings."

Brown Transport Corp., Elberton, Ga., also reported a $6.2 million turn-around in 1986. Brown is an LTL carrier that went public in 1986. Seven other carriers went public in 1986, but all were truckload operators.

Chief financial officer W. Paul Harris attributed Brown's earlier losses to a costly equipment acquisition program and delays in the integration of two acquired intrastate carriers.

Other carriers regaining profitability in 1986 include Tri-State Motor Freight, Joplin, Mo., a nuclear materials hauler. Tri-State earned $4.4 million on revenues of $115.7 million. In 1985, Tri-State reported a $1.2 million loss. Atlas Van Lines of Evansville, Ind., also regained profitability on revenues of $180 million, reporting net income of $15,000.

To the casual observer, the industry seems to be sending contradictory signals. For example, while there is still lots of volatility in the marketplace and territorial expansion spurred by acquisition fever and aggressive rate cutting, there are also many low profile LTL carriers whose performance improves each year without fanfare.

One such company is St. Johnsbury Trucking, headquartered in Holliston, Me. Last year, St. Johnsbury earned $10.1 million on revenues of $260 million. St. Johnsbury's performance is noteworthy because the company operates from what is considered an "end state." Freight comes in, but little goes out. St. Johnsbury is

Continued

101	RISS INTERNATIONAL CORP, KANSAS CITY, MO	CMGF	$55528	$54673	$424	98.5	95.8
102	KENOSHA AUTO TRPT CORP, KENOSHA, WI	CMMV	55367	53961	702	97.5	101.1
103	SAIA MOTOR FRT LINE INC, HOUMA, LA	CMGF	55175	48752	6547	88.4	87.2
104	FLEET TRANSPORT CO INC, CLEVELAND, OH	CMLP	55149	53374	575	96.8	101.8
105	MORGAN DRIVE AWAY INC, ELKHART, IN	CMSC	54999	54458	420	99.0	99.8
106	PRE-FAB TRANSIT CO, FARMER CITY, IL	CMBM	54881	53119	971	96.8	98.5
107	G I TRUCKING CO, LA MIRADA, CA	CMGF	54808	54083	24-	98.7	98.6
108	DUFF TRUCK LINE INC, LIMA, OH	CMGF	54122	57145	981	105.6	105.7
109	DAILY EXPRESS INC, CARLISLE, PA	CMSC	53534	50898	3796	95.1	94.8
110	DEATON INC, BIRMINGHAM, AL	CMSC	53126	48922	3176	92.1	91.3
111	GLOBAL VAN LINES INC, ORANGE, CA	CMHG	52735	52976	3916-	100.5	99.9
112	RED ARROW FRT LNS INC, SAN ANTONIO, TX	CMGF	52543	54688	1522-	104.1	103.2
113	MELTON TRUCK LINES INC, SHREVEPORT, LA	CMBM	52533	52722	9	100.4	99.7
114	MARTEN TRANSPORT LTD, MONDOVI, WI	CMRC	52462	45610	2927	86.9	87.8
115	ALTERMAN TRPT LNS INC, OPA LOCKA, FL	CMRC	51951	51219	25	98.6	97.8
116	NORTH PENN TRANSFER INC, LANSDALE, PA	CMGF	51771	51400	317	99.3	100.0
117	WILSON TRUCKING CORP, FISHERSVILLE, VA	CMGF	51767	44806	3797	86.6	88.8
118	DSI TRANSPORTS INC, DEER PARK, TX	CMSC	51217	45828	2009	89.5	89.7
119	• MISTLETOE EXPRESS SERVICE, OKLAHOMA CITY, OK	CMGF	50798	56775	4973-	111.8	104.4
120	SPARTAN EXPRESS INC, GREER, SC	CMGF	50352	51135	720-	101.6	95.3
121	GRAEBEL VAN LINES INC, WAUSAU, WI	CMHG	50231	47174	1204	93.9	92.9
122	MC GIL SPECIALIZED CARRIERS, MARIETTA, GA	CMSC	50140	49166	359	98.1	100.6
123	MUNSON TRANSPORTATION INC, MONMOUTH, IL	CMGF	49865	44890	1460	90.0	91.0
124	COMMERCIAL CARRIER CORP, AUBURNDALE, FL	CMSC	49125	43254	4322	88.0	88.9
125	WILLIS SHAW FROZEN EXP, ELM SPRINGS, AR	CMRC	48485	43918	2329	90.6	90.9
126	LEASEWAY MOTORCAR TRPT CO, BIRMINGHAM, MI	CMMV	47518	46747	49	98.4	108.4
127	STANDARD TRUCKING CO, CHARLOTTE, NC	CMGF	47316	49081	1287-	103.7	105.8
128	MC KENZIE TANK LINES INC, TALLAHASSEE, FL	CMLP	46363	41513	3293	89.5	93.3
129	CENTRAL TRANSPORT INC, HIGH POINT, NC	CMSC	46268	41961	4353	90.7	90.5
130	MERCHANTS HOME DLVY SVC, OXNARD, CA	CMGF	46221	41910	1923	90.7	91.6
131	SCHWERMAN TRUCKING CO, MILWAUKEE, WI	CMSC	45898	43449	1627	94.7	97.1
132	AVERITT EXPRESS INC, COOKEVILLE, TN	CMGF	44839	41057	1502	91.6	92.4
133	MAY TRUCKING CO, PAYETTE, ID	CMGF	44273	42332	1660	95.6	99.0
134	LYNDEN TRANSPORT INC, SEATTLE, WA	CMGF	43657	44413	458-	101.7	94.9
135	COLONIAL FREIGHT SYS INC, KNOXVILLE, TN	CMGF	42917	41937	298	97.7	96.6
136	HADLEY AUTO TRANSPORT, SANTA ANA, CA	CTMV	42838	40255	827	94.0	94.0
137	SHAFFER TRUCKING INC, NEW KINGSTOWN, PA	CMSC	42567	37292	2962	87.6	90.5
138	SOUTHWESTERN MTR TRPT INC, SAN ANTONIO, TX	CMGF	42393	42845	367-	101.1	92.3
139	P A M TRANSPORT INC, TONTITOWN, AR	CMGF	42383	36165	2644	85.3	86.8
140	CON-WAY EASTERN EXPRESS INC, PORTLAND, OR	CMGF	42355	43714	704	103.2	102.3
141	DALLAS & MAVIS FWDG CO, KENOSHA, WI	CMMV	42347	40650	676	96.0	96.2
142	JACK GRAY TRANSPORT INC, GARY, IN	CMSC	42318	41306	462	97.6	99.3
143	CROUSE CARTAGE CO, CARROLL, IA	CMGF	41882	43149	544-	103.0	101.2
144	JAY LINES INC, D F W STATION, TX	CMGF	41837	36996	2356	88.4	95.3
145	DI SALVO TRUCKING CO, SAN FRANCISCO, CA	CMGF	41824	40360	482	96.5	100.5
146	• TENNESSEE CTG CO INC, NASHVILLE, TN	CMRC	41789	40008	702	95.7	99.5
147	ROBERTS EXPRESS INC, AKRON, OH	CMGF	41103	37086	2185	90.2	89.1
148	SANBORN'S MOTOR EXP INC, PORTLAND, ME	CMGF	40831	41284	203	101.1	100.1
149	WHEATON VAN LINES INC, INDIANAPOLIS, IN	CMHG	40669	38267	1708	94.1	95.6
150	DONCO CARRIERS INC, OKLAHOMA CITY, OK	CMGF	39901	36563	2280	91.6	95.4

151	QUALITY CARRIERS INC, PLEASANT PRAIRE, WI	CMSC	$39816	$37991	$210	95.4	95.8
152	WILEY SANDERS TRUCK LNS INC, TROY, AL	CMSC	39506	36851	1075	93.3	92.6
153	• STEVE D THOMPSON TRKG, WINNSBORO, LA	CMGF	38791	38158	134-	98.4	89.8
154	SAM TANKSLEY TRKG INC, CAPE GIRARDEAU, MO	CMGF	38670	37238	654	96.3	100.2
155	PIRKLE REFRIG FRT LNS INC, DE FOREST, WI	CMRC	38316	37648	158	98.3	98.4
156	KENAN TRANSPORT CO, CHAPEL HILL, NC	CMLP	38122	33133	2746	86.9	88.0
157	MONTGOMERY TANK LNS INC, SUMMIT, IL	CMSC	38049	37319	730	98.1	96.1
158	SCHANNO TRPTN INC, W ST PAUL, MN	CMGF	37786	35738	612	94.6	96.4
159	FREDRICKSON MTR EXP CORP, CHARLOTTE, NC	CMGF	37563	36919	110	98.3	98.9
160	FORE WAY EXPRESS INC, WAUSAU, WI	CMGF	37297	36086	525	96.8	99.1
161	A A A TRUCKING CORP, TRENTON, NJ	CMGF	37208	39766	2869-	106.9	101.5
162	INTERMODAL TRPTN SVC INC, CINCINNATI, OH	CMGF	37159	36649	275	98.6	101.4
163	WARD TRUCKING CORP, ALTOONA, PA	CMGF	36922	36027	1159	97.6	99.4
164	LENERTZ INC, SOUTH ST PAUL, MN	CMGF	36631	35309	917	96.4	98.7
165	PLOOF TRUCK LINES INC, JACKSONVILLE, FL	CMBM	36494	30048	6398	82.3	86.1
166	TNT BESTWAY TRPTN INC, PHOENIX, AZ	CMGF	36364	33275	2168	91.5	97.0
167	ALTRUK FREIGHT SYS INC, TAMPA, FL	CMGF	35969	35595	480	99.0	100.2
168	ARMELLINI EXPRESS LNS INC, PALM CITY, FL	CMSC	35773	33786	891	94.4	103.7
169	MIDDLEWEST FRTWAYS INC, ST LOUIS, MO	CMGF	35070	32873	928	93.7	97.3
170	PROCESSED BEEF EXP INC, DAKOTA CITY, NE	CTRC	34937	30215	2687	86.5	82.9
171	MASON & DIXON LNS INC, KINGSPORT, TN	CMGF	34661	35445	11567-	102.3	92.7
172	INTERSTATE DISTRIBUTOR CO, TACOMA, WA	CTFP	34295	32597	526	95.0	97.6
173	ASSOCIATED PETRO CRRS INC, SPARTANBURG, SC	CMLP	34269	33966	441	99.1	98.8
174	GLENN MC CLENDON TRKG CO, LAFAYETTE, AL	CMGF	34239	31667	743	92.5	93.2
175	NATIONWIDE CARRIERS INC, MAPLE PLAIN, MN	CMGF	33939	38224	3647-	112.6	104.9
176	P S T INC, LINDON, UT	CMGF	33768	32701	562	96.8	97.1
177	SAMMONS TRUCKING, MISSOULA, MT	CMBM	33747	32990	558	97.8	96.7
178	MONFORT TRANSPORTATION CO, GREELEY, CO	CTSC	33348	30989	2213	92.9	93.9
179	R P D INC, MIAMI, FL	CTSC	33077	33628	1118-	101.7	93.1
180	GEORGE TRANSFER INC, PARKTON, MD	CMSC	33055	33868	627-	102.5	97.8
181	A J METLER HLG & RIG INC, KNOXVILLE, TN	CMSC	32882	32044	187	97.5	95.9
182	BLUE RIDGE TRF CO INC, ROANOKE, VA	CMSC	32753	32118	168	98.1	99.3
183	FLEET CARRIER CORP, PONTIAC, MI	CMMV	32700	29801	1204	91.1	85.7
184	TLC LINES INC, FENTON, MO	CMGF	32697	31958	306	97.7	97.5
185	MANFREDI MOTOR TRANSIT CO, NEWBURY, OH	CTSC	32683	31210	29	95.5	93.5
186	SMITHWAY MTR XPRESS INC, FORT DODGE, IA	CMBM	32579	31515	157	96.7	95.2
187	GROSS & HECHT TRKG INC, EDISON, NJ	CTRS	32229	31130	490	96.6	95.0
188	C R ENGLAND & SONS INC, SALT LAKE CITY, UT	CMGF	31976	31560	427	98.7	122.8
189	ENTERPRISE TRPTN CO, HOUSTON, TX	CMLP	31879	28841	1514	90.5	102.1
190	THE O K TRUCKING CO, CINCINNATI, OH	CMGF	31644	31092	371	98.3	99.4
191	MALONE FREIGHT LINES INC, BIRMINGHAM, AL	CMGF	31640	31708	141-	100.2	101.2
192	THE WAGGONERS TRUCKING, BILLINGS, MT	CMGF	31385	30574	354	97.4	97.6
193	COORS TRANSPORTATION CO, WHEATRIDGE, CO	CMRC	31290	31656	174-	101.2	97.0
194	MITCHELL TRANSPORT INC, CLEVELAND, OH	CMGF	31181	32878	3330-	105.4	102.5
195	THE MICKOW CORP, DES MOINES, IA	CMSC	30460	30197	131-	99.1	97.3
196	UMTHUN TRUCKING CO, EAGLE GROVE, IA	CMBM	30083	29134	211	96.8	98.0
197	GROSS COMMON CARRIER INC, WISCONSIN RAPIDS, W	CMGF	29322	28703	513	97.9	97.9
198	• ACME TRUCK LINE INC, HARVEY, LA	CMSC	28777	29508	688-	102.5	101.3
199	PAUL ARPIN VAN LINES INC, EAST GREENWICH, RI	CMHG	28744	27900	266	97.1	99.7
200	CUSTOM DELIVERIES INC, BIRMINGHAM, MI	CTSC	28696	27792	312-	96.8	97.3
	Totals for Top 101 - 200		4105412	3953304	64660	93.7	94.4

TOTAL: 101-200 - 1986	$4,105,412	$3,953,304	$64,660
TOTAL: 101-200 - 1985	3,895,628	3,739,735	59,970
TOTAL: 101-200 - 1984	4,016,147	3,874,112	66,697

RANK BY FLEET SIZE

1	1	United Parcel Service Inc	61,827
2	3	Yellow Freight System Inc	35,102
3	5	Consolidated Freightways of DE	31,053
4	4	Roadway Express Inc	30,882
5	2	United Parcel Service Inc NY	19,117
6	6	North American Van Lines Inc	17,050
7	7	P*I*E Nationwide Inc	16,694
8	8	Overnite Transportation Co	13,711
9	9	A B F Freight System Inc	13,473
10	12	ANR Freight System Inc	12,283
11	10	Carolina Freight Carriers Corp	10,792
12	23	Signal Delivery Service Inc	9,682
13	17	Preston Trucking Co Inc	7,384
14	19	American Freight System Inc	7,360
15	14	Smith's Transfer Corp	7,118
16	28	Central Freight Lines Inc	6,679
17	13	Allied Van Lines Inc	6,568
18	16	Anchor Motor Freight Inc	6,373
19	25	J B Hunt Transport Inc	6,270
20	39	National Freight Inc	6,003
21	15	Transcon Lines	5,537
22	11	United Van Lines Inc	5,206
23	34	Bowman Transportation Inc	5,204
24	29	Brown Transport Corp	4,943
25	26	Matlack Inc	4,889
26	18	Mayflower Transit Inc	4,816
27	35	Jones Truck Lines Inc	4,525
28	30	Chemical Leaman Tank Lns	4,494
29	52	Builders Transport Inc	4,128
30	37	Thurston Motor Lines Inc	3,916
31	21	Complete Auto Transit Inc	3,884
32	46	C W Transport Inc	3,690
33	47	Tri-State Motor Transit Co	3,254
34	31	Commercial Carriers Inc	3,172
35	32	Pilot Freight Carriers Inc	3,152
36	33	Atlas Van Lines Inc	3,139
37	36	Viking Freight System Inc	3,040
38	58	Werner Enterprises Inc	2,838
39	76	Jones Transfer Company	2,625
40	53	Old Dominion Freight Line Inc	2,603
41	42	Milne Truck Lines Inc	2,511
42	54	Jack Cooper Transport Co Inc	2,476
43	55	Overland Express Inc	2,466
44	20	St Johnsbury Trucking Co Inc	2,433
45	57	Transus Inc	2,426
46	73	Estes Express Lines	2,420
47	51	M & G Convoy Inc	2,308
48	40	Ryder Freight System Inc	2,273
49	56	Churchill Truck Lines Inc	2,209
50	64	Southeastern Freight Lines Inc	2,172
51	87	Hyman Freightways Inc	2,086
52	77	Dart Transit Company	2,059
53	70	AAA Cooper Transportation	2,044
54	60	Koch Service Inc	1,939
55	38	Nu-Car Carriers Inc	1,909
56	48	Red Star Express Lines—Auburn Inc	1,828
57	43	Holland Motor Express Inc	1,813
58	50	A-P-A Transport Corp	1,617
59	71	Contract Freighters Inc	1,566
60	65	New Penn Motor Express Inc	1,547
61	89	Holmes Transportation Inc	1,530
62	67	Crete Carrier Corp	1,513
63	85	Willig Freight Lines	1,486
64	97	Missouri Nebraska Express Inc	1,439
65	62	Burnham Service Co Inc	1,339
66	84	Miller Transporters Inc	1,299
67	92	Groendyke Transport Inc	1,275
68	78	Midwest Coast Transport Inc	1,192
69	80	Advance Transportation Co	1,182
70	44	D P D Inc	1,127
71	79	Auto Convoy Co	1,056
72	88	Convoy Company	1,023
73	94	Refiners Transport & Term Corp	989
74	45	The Motor Convoy Inc	987
75	95	K L L M Inc	981
76	86	National Carriers Inc	979
77	66	Jones Motor Co Inc	921
78	91	Lyons Transportation Lines Inc	915
79	93	Janesville Auto Transport Co	899
80	61	F F E Transportation Services Inc	882
81	63	Pacific Motor Trucking Co	872
82	27	Bekins Van Lines Co	836
83	22	Central Transport Inc	760
84	83	Pauls Trucking Corp	758
85	49	Northwest Transport Service Inc	682
86	81	Cassens Transport Co	668
87	69	Midwestern Distribution Inc	652
88	41	Watkins Motor Lines Inc	632
89	24	Schneider Transport Inc	537
90	98	Mercer Transportation Co	413
91	68	Merchants Fast Motor Lines	310
92	72	Pennsylvania Truck Lines Inc	205
93	59	E & L Transport Co	*
94	74	Southwest Motor Freight	*
95	75	Anderson Trucking Service Inc	*
96	82	Stoops Express Inc	*
97	90	Eck Miller Transportation Corp	*
98	96	Whiteford Truck Lines Inc	*
99	99	Country Wide Truck Service	*
100	100	Carretta Trucking Inc	*

* These companies did not report total vehicles.

succeeding because "they have recognized that tonnage is very expensive to buy and they are unwilling to chase unprofitable freight. They carefully watch their lane density and who they do business with," said Tony Robertson, an analyst for Alex. Brown & Sons.

St. Johnsbury is part of Sun Carriers, Inc., once owned by Sun Oil Co. of Philadelphia, Pa. The carrier is now owned by Riordan, Freeman and Spogli, a Los Angeles-based banker's group. Jones Truck Line, Springdale, Ark., and Milne Truck Line, of Pleasanton, Calif., make up the rest of the Sun Group. Milne and Jones are listed in the top 50 and both were profitable in 1986.

Another carrier that has continued growth without fanfare is Preston Trucking of Preston, Md. Preston inched up to 17th in 1986 on revenues of $320.6 million.

The company had net profits of $5.1 million last year, and president William Potter said he expects the company's 1987 net income to exceed 1986 earnings.

Preston made several acquisitions during the past 18-months, giving the company access to the Northwest and Southern California areas.

Preston operates Reeves Transportation of Calhoun, Ga., and also runs Pioneer, a TL operation

RANK BY LINEHAUL CPM

1	82	Burnham Service Co Inc	0.44
2	64	Southeastern Freight Lines Inc	0.51
3	25	J B Hunt Transport Inc	0.64
4	71	Contract Freighters Inc	0.68
5	55	Overland Express Inc	0.73
6	89	Holmes Transportation Inc	0.76
7	58	Werner Enterprises Inc	0.78
8	8	Overnite Transportation Inc	0.80
9	95	K L L M Inc	0.80
10	40	Ryder Freight System Inc	0.82
11	52	Builders Transport Inc	0.82
12	99	Country Wide Truck Service	0.85
13	29	Brown Transport Corp	0.86
14	41	Watkins Motor Lines Inc	0.86
15	50	A-P-A Transport Corp	0.86
16	37	Thurston Motor Lines Inc	0.87
17	97	Missouri Nebraska Express Inc	0.87
18	78	Midwest Coast Transport Inc	0.88
19	67	Crete Carrier Corp	0.89
20	34	Bowman Transportation Inc	0.90
21	35	Jones Truck Lines Inc	0.90
22	70	AAA Cooper Transportation	0.93
23	28	Central Freight Lines Inc	0.95
24	100	Carretta Trucking Inc	0.95
25	9	A B F Freight System Inc	0.96
26	53	Old Dominion Freight Line Inc	0.96
27	90	Eck Miller Transportation Corp	0.96
28	98	Mercer Transportation Co	0.96
29	57	Transus Inc	0.99
30	86	National Carriers Inc	0.99
31	69	Midwestern Distribution Inc	1.00
32	73	Estes Express Lines	1.00
33	15	Transcon Lines	1.01
34	76	Jones Transfer Company	1.01
35	36	Viking Freight System Inc	1.02
36	77	Dart Transit Company	1.02
37	14	Smith's Transfer Corp	1.03
38	20	St Johnsbury Trucking Co Inc	1.04
39	47	Tri-State Motor Transit Co	1.04
40	3	Yellow Freight System Inc	1.07
41	56	Churchill Truck Lines Inc	1.07
42	32	Pilot Freight Carriers Inc	1.08
43	43	Holland Motor Express Inc	1.10
44	92	Groendyke Transport Inc	1.11
45	49	Northwest Transport Service Inc	1.12
46	68	Merchants Fast Motor Lines	1.13
47	7	P*I*E Nationwide Inc	1.14
48	19	American Freight System Inc	1.15
49	10	Carolina Freight Carriers Corp	1.16
50	5	Consolidated Freightways of DE	1.17
51	66	Jones Motor Co Inc	1.17
52	87	Hyman Freightways Inc	1.17
53	4	Roadway Express Inc	1.19
54	22	Central Transport Inc	1.19
55	42	Milne Truck Lines Inc	1.19
56	91	Lyons Transportation Lines Inc	1.22
57	84	Miller Transporters Inc	1.27
58	17	Preston Trucking Co Inc	1.28
59	39	National Freight Inc	1.29
60	80	Advance Transportation Co	1.30
61	48	Red Star Exp Lns—Auburn Inc	1.32
62	85	Willig Freight Lines	1.32
63	94	Refiners Transport & Term Corp	1.36
64	46	C W Transport Inc	1.39
65	12	ANR Freight System Inc	1.41
66	30	Chemical Leaman Tank Lines	1.45
67	79	Auto Convoy Co	1.49
68	65	New Penn Motor Express Inc	1.50
69	16	Anchor Motor Freight Inc	1.51
70	54	Jack Cooper Transport Co Inc	1.53
71	26	Matlack Inc	1.55
72	61	F F E Transportation Services Inc	1.59
73	81	Cassens Transport Co	1.61
74	18	Mayflower Transit Inc	1.64
75	88	Convoy Company	1.64
76	21	Complete Auto Transit Inc	1.66
77	93	Janesville Auto Transport Co	1.66
78	44	D P D Inc	1.74
79	31	Commercial Carriers Inc	1.77
80	45	The Motor Convoy Inc	1.90
81	6	North American Van Lines Inc	1.96
82	33	Atlas Van Lines Inc	2.00
83	83	Pauls Trucking Corp	2.05
84	27	Bekins Van Lines Co	2.08
85	13	Allied Van Lines Inc	2.17
86	38	Nu-Car Carriers Inc	2.17
87	63	Pacific Motor Trucking Co	2.20
88	11	United Van Lines Inc	2.24
89	51	M & G Convoy Inc	2.27
90	1	United Parcel Service Inc	2.74*
91	2	United Parcel Service Inc NY	*
92	23	Signal Delivery Service Inc	**
93	24	Schneider Transport Inc	**
94	59	E & L Transport Co	**
95	60	Koch Service Inc	**
96	72	Pennsylvania Truck Lines Inc	**
97	74	Southwest Motor Freight	**
98	75	Anderson Trucking Service Inc	**
99	82	Stoops Express Inc	**
100	96	Whiteford Truck Lines Inc	**

*United Parcel Service reports linehaul cpm combined for New York and Illinois.
**These companies did not report total linehaul cost.

that, until now, used owner operators. Potter said the independents are being phased-out in favor of company drivers. Frontier Trucking is another TL division of Preston that employs owner operators.

The company's Reeves Transportation Div., in January 1987, acquired Carpet Services of Seattle and four of Carpet's affiliated companies. Also under the Preston umbrella are Bowie Hall Trucking Co. and Smalley Transportation Co. of Tampa, Fla. Smalley Transportation is Florida's largest intrastate carrier.

Central Freight Lines, of Waco, Tex., continues to be the nation's biggest intrastate carrier. Last year the company earned $4.5 million on revenues of $195.8 million. Earnings were down $1.9 million from 1985, however. A company spokesman said 1985 earnings were inflated because of non-operating income generated by the sale of real estate and other corporate assets.

Acquisitions still play an important role in altering the face of the industry, especially the LTL segment. Buyouts worth noting in 1986 include the sale of Sanborn Motor Express, of Portland, Me., ranked 148 in this year's Second 100, to A-P-A Transport of North Bergen, N.J., ranked 50. The purchase price was not disclosed.

Continued

A-P-A's Top 100 rank advanced three places on revenues of $108.6 million. The company reported net profits of $25.5 million.

Mid-Western Transport of Columbus, Ind., an LTL carrier, was acquired in late December by Circle Express of Indianapolis, Ind., a holding company with a wide range of transportation interests.

Circle Express continues to extend its trucking influence in the Midwest. Before the Mid-Western Transport acquisition, Circle Express owned four other TL carriers. All Circle Express properties use owner operators and solicit freight through commissioned agents.

Caudell Transport, of Forest Park, Ga., a refrigerated operator, went through a second acquisition. It was originally purchased, in 1985, by Transus, Inc. of Atlanta, Ga., a LTL and marine container operator. Transus ranks 57 in this year's Top 100. Company officials later said the expected synergies in the two companies' operations failed to materialize, and, in January 1986, Caudell was purchased by Altruk Freight System of Tampa, Fla. Altruk is also waiting ICC approval for authority to operate Schreiber Transit, Green Bay, Wis., pending acquisition.

Altruk is a subsidiary of Rocor, a Phoenix-based holding company, that controls nearly a dozen refrigerated carriers.

The future of the LTL segment of the industry is expected to remain unstable, as major carriers like Roadway, Yellow, CF, Carolina Freight and others continue to increase market share. Aggressive pricing still rules the marketplace and that is not expected to change in the foreseeable future. In the meantime, truckload operators, many of which are nonunion, continue to grow.

Most of the LTL carriers using Teamsters will have contract renewal talks beginning later this year. It is too early to predict how those talks will impact on rates, but the Teamsters are expected to demand wage increases in the face of substantial givebacks agreed to during contract negotiations three years ago.

While the Top 100 list of carriers represents the so-called Blue Blood, the Second 100 is also filled with carriers that are innovative and aggressive. It is in the Second 100 that some of today's Top 100 leaders originated, and more are expected to follow in the next few years.

The bottom line is that the Top 100 carriers are unlikely to show substantial gains in earnings in 1987. As J. Harwood Cochrane, chairman of Overnite Transportation, Richmond, Va., said: "Shippers have gotten real good at playing one trucking company against another." □

Index To TOP 100 As Ranked By Revenue

	1986	1985
AAA Cooper Transportation	70	73
A B F Freight System Inc	9	9
ANR Freight System Inc	12	NR
A-P-A Transport Corp	50	53
Advance Transportation Co	80	78
Allied Van Lines	13	12
American Freight System Inc	19	17
Anchor Motor Freight Inc	16	11
Anderson Trucking Service Inc	75	99
Atlas Van Lines Inc	33	33
Auto Convoy Company	79	84
Bekins Van Lines Co	27	23
Bowman Transportation Inc	34	31
Brown Transport Corp	29	27
Builders Transport Inc	52	47
Burnham Service Co Inc	62	62
C W Transport Inc	46	41
Carolina Freight Carriers Corp	10	10
Carretta Trucking Inc	100	105
Cassens Transport Co	81	82
Central Freight Lines Inc	28	25
Central Transport Inc	22	20
Chemical Leaman Tank Lines	30	34
Churchill Truck Lines Inc	56	61
Commercial Carriers Inc	31	29
Complete Auto Transit Inc	21	19
Consolidated Freightways of DE	5	5
Contract Freighters Inc	71	81
Convoy Company	88	115
Country Wide Truck Service	99	NR
Crete Carrier Corp	67	65
D P D Inc	44	70
Dart Transit Company	77	88
E & L Transport Co	59	63
Eck Miller Transportation Corp	90	130
Estes Express Lines	73	85
F F E Transportation Services Inc	61	64
Groendyke Transport Inc	92	89
Holland Motor Express Inc	43	48
Holmes Transportation Inc	89	93
Hunt J B Transport Inc	25	37
Hyman Freightways Inc	87	91
Jack Cooper Transport Co Inc	54	40
Janesville Auto Transport Co	93	87
Jones Motor Co Inc	66	55
Jones Transfer Company	76	80
Jones Truck Lines Inc	35	30
K L L M Inc	95	NR
Koch Service Inc	60	NR
Lyons Transportation Lines Inc	91	100
M & G Convoy Inc	51	54
Matlack Inc	26	24
Mayflower Transit Inc	18	16
Mercer Transportation Co	98	92
Merchants Fast Motor Lines	88	59
Midwest Coast Transport Inc	78	79
Midwestern Distribution Inc	69	51
Miller Transporters Inc	84	94
Milne Truck Lines Inc	42	52
Missouri Nebraska Express Inc	97	133
The Motor Convoy Inc	45	49
National Carriers Inc	86	109
National Freight Inc	39	50
New Penn Motor Express Inc	65	71
North American Van Lines Inc	6	6
Northwest Transport Service Inc	49	57
Nu-Car Carriers Inc	38	43
Old Dominion Freight Line Inc	53	45
Overland Express Inc	55	56
Overnite Transportation Co	8	8
Pacific Motor Trucking Co	83	58
Pauls Trucking Corp	83	83
Pennsylvania Truck Lines Inc	72	69
P*I*E Nationwide Inc	7	7
Pilot Freight Carriers Inc	32	28
Preston Trucking Co Inc	17	18
Red star Exp Lns—Auburn Inc	48	46
Refiners Transport & Term Corp	94	123
Roadway Express Inc	4	3
Ryder Freight System Inc	40	39
St Johnsbury Trucking Co Inc	20	21
Schneider Transport Inc	24	NR
Signal Delivery Service Inc	23	22
Smith's Transfer Corp	14	14
Southeastern Freight Lines Inc	64	68
Southwest Motor Freight	74	86
Stoops Express Inc	82	95
Thurston Motor Lines Inc	37	36
Transcon Lines	15	15
Transus Inc	57	60
Tri-State Motor Transit Co	47	44
United Parcel Service Inc	1	1
United Parcel Service Inc	2	2
United Van Lines Inc	11	13
Viking Freight System Inc	36	38
Watkins Motor Lines Inc	41	42
Werner Enterprises Inc	58	72
Whiteford Truck Lines Inc	96	121
Willig Freight Lines	85	103
Yellow Freight System Inc	3	4

Top 100 and Trends & Statistics are available in a booklet for $5. Write, Reprint Editor, Commercial Carrier Journal, Chilton Way, Radnor, Pa. 19089.

INDUSTRY TRENDS AND STATISTICS

By **JERRY STANDLEY**, *Editor-In-Chief*, and **MARGARET ROMAN-SLAVIN**, *Market Research Editor*

"The (trailer) market is yours for the next five years. Go after it!" That's Peter M. Toja, vice president, Merrill Lynch Economics, New York, speaking at the Truck Trailer Manufacturers Association convention. Toja is predicting 1987 trailer sales of 172,400 units and 181,900 in 1988. Toja's 1986 forecast was off by 800 units (see CCJ, June 1987, pg. 42).

The truck outlook is reportedly good also, but optimism here is laced with caution. Analysts reporting to CCJ predicted a modest 5% increase in 1987 Class 1 to 8 truck sales, but the year so far looks much better. January-April factory sales of Class 1 to 8 trucks are up 11.8% from the same period last year. Classes 7 and 8 are up 8.6%. Class 7 increased 3% less than many had expected. Class 8 sales increased 12.9%. Class 6 declined 9% for the period.

Granted, four months "does not a year make," and most analysts continue to advise a cautiously optimistic approach for 1987.

According to Toja, the 1987 combined retail outlook for Class 6, 7 and 8 trucks is 275,000 units, and by 1990 that figure will increase 11% to 305,000 units; 319,000 by 1992. Class 7 is expected to increase at a faster rate than Class 8, while marginal increases are expected for Class 6.

STATISTICAL ANALYSIS OF THE TRUCK INDUSTRY—PRIVATE AND FOR-HIRE CARRIAGE*

3,390	4,047,660	1,494,990	583,080	1,515,330	183,060	271,200
13,168	2,935,837	830,243	420,016	822,461	139,724	239,446
13,886	1,117,044	318,244	153,410	271,737	57,978	104,052
20,879	662,737	280,751	106,949	179,257	47,936	83,746
29,390	618,748	220,503	62,414	94,541	24,702	46,964
80,713	9,582,026	3,144,731	1,325,869	2,883,326	453,400	745,408
15,466	2,648,885	272,156	551,254	1,442,261	15,773	35,865
3,262	1,303,800	468,412	228,973	425,066	8,118	25,965
10,326	732,021	251,044	124,006	231,660	3,271	41,945
7,151	1,325,372	721,026	81,078	84,367	34,552	294,478
13,924	646,045	271,116	52,155	101,397	3,377	163,183
6,455	432,771	111,224	79,002	139,155	3,118	55,131
3,285	197,912	72,675	34,521	59,484	1,125	8,352
3,480	737,592	527,704	10,287	71,860	4,156	53,257
6,185	391,913	152,097	50,113	115,147	3,322	29,566
913	60,361	41,884	3,288	5,039	162	4,250
3,419	239,475	43,730	2,292	4,048	152,499	11,482
1,941	227,045	10,227	1,122	3,860	183,464	2,852
2,906	640,814	201,437	107,776	199,941	40,462	19,082
80,713	9,582,026	3,144,731	1,325,869	2,883,326	453,400	745,408

* Does not include passenger cars. *Source: CCJ Census of the Professional Truck Fleet Market, June 1987*

TRENDS & STATISTICS

NUMBER OF FOR-HIRE CARRIERS

947	1,387	33,903	36,948
1,013	1,489	30,337	33,283
1,088	1,554	27,370	30,481
1,139	1,631	24,411	27,517
1,144	2,139	22,059	25,722
1,031	2,293	18,563	22,270
947	2,164	14,610	18,045

Carrier totals for 1986 reflect 711 Class I and II carriers operating, but exempted from filing with the Interstate Commerce Commission. The number of exempted Class I and II carriers in previous years totaled: 444 in 1985; 469 in 1984; 336 in 1983; 380 in 1982; 383 in 1981; and 324 in 1980.

Source: American Trucking Associations, Inc.

SELECTED FINANCIAL DATA FROM CLASS 1 AND CLASS 2 COMMON CARRIERS

439	439		
$19,721,231	$18,580,751	6.14%	100.00%
$1,582,969	$1,445,412	9.52%	8.03%
$5,638,618	$5,329,761	5.79%	28.59%
$556,280	$545,050	2.06%	2.82%
$2,179,250	$2,027,172	7.50%	11.05%
$9,957,117	$9,347,395	6.52%	50.49%
$1,877,592	$2,149,907	(12.67%)	9.52%
$836,282	$778,497	7.42%	4.24%
$677,204	$635,499	6.56%	3.43%
$603,102	$474,606	27.07%	3.06%
$332,297	$312,653	6.28%	1.68%
$836,605	$770,551	8.57%	4.24%
$3,194,921	$3,074,245	3.93%	16.20%
$191,775	$184,085	4.18%	0.97%
$135,382	$144,612	(6.38)%	0.69%
$18,642,277	$17,872,050	4.31%	94.53%
$1,078,954	$708,701	52.24%	5.47%
$976,956	$623,965	56.57%	4.95%
$590,625	$359,416	64.33%	2.99%
94.53	96.19		
2.99%	1.93%		
8,471,506	8,016,450	5.66%	
301,778	292,906	3.03%	

This chart compares totals and percentage changes in selected 1986 and 1985 financial items for 439 Class 1 and Class 2 common carriers. Carrier performance fell off slightly in 1986 from 1984, but significant rebounds are indicated in the 1986 numbers. Total miles increased 5.66% and tons 3.03%, but operating expense increases were held to 4.31%. With insurance expense as the only notable exception to moderate expense increases—and no surprise to anybody—the group financial performance was sound. Net income after taxes jumped 64.33%. Average operating ratio improved 1.66 points to 94.53 and net profit margin improved 55% to 2.99% from 1.93. This chart is compiled by American Trucking Associations, Inc., Alexandria, Va., based on carrier financial reports (Form QFR) to the Interstate Commerce Commission by Class 1 and 2 "Instruction 27" carriers (75% or greater revenues derived from general commodity freight). Statistics from United Parcel Service, contract carriers and household goods movers are excluded from this chart. To provide accurate comparisons, figures from 1985 are restated on the basis of those same carriers filing 1986 reports with the ICC.

15-YEAR FACTORY SALES OF TRUCKS BY GVW (1972 through 1986)

(Includes U.S. total domestic and export sales. Excludes tactical military vehicles and buses.)

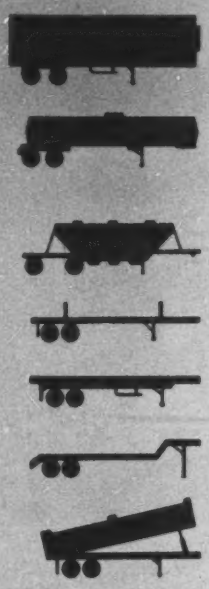
No. of Units	% of Total
18,614,682	49.3
14,754,204	39.0
267,611	.7
25,202	.1
101,139	.3
1,558,245	4.1
706,861	1.9
1,767,907	4.7
37,795,851*	100.0

* R.L. Polk estimates the total number of Class 1 to 6 trucks in use is 44,825,523. The R.L. Polk total includes imported vehicles, school buses and private fleet buses, but does not include municipal buses. The CCJ total listed above does not include buses or imports, and does not reflect a scrappage rate, which R.L. Polk estimates at 5% annually.

Source: Motor Vehicle Manufacturers Association, CCJ Marketing Dept.

TRENDS & STATISTICS

BREAKDOWN OF NEW TRAILER SHIPMENTS (1972 through 1986)



	Number	% of Total
VANS		
Dry Freight/Closed Top	1,101,595	47.7
Dry Freight/Open Top	66,983	2.9
Insulated/Semi-Insulated	269,569	11.7
Drop Frame	70,868	3.1
Livestock	23,431	1.0
Total Vans	1,532,446	66.4
SPECIAL TYPES		
Tanks/Liquid	97,226	4.2
Dry Bulk	26,496	1.1
Pole and Logging	24,818	1.1
Platform	341,260	14.8
Low-Bed	94,203	4.1
Dump	106,485	4.6
All Others	86,136	3.7
Total Special Types	776,624	33.6
TOTAL COMPLETE TRAILERS	2,309,070	100.0
Detachable Trailers[1]	123,882	
Detachable Chassis[2]	223,464	
Dollies and Converter Gear[3]	52,658	

1. Mostly container units. 2. Mostly for use with containers. 3. Separate axle and fifth wheel assembly used to convert semi-trailer into full trailer for twin trailer operations.
Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.

NEW TRAILER SHIPMENTS BY TYPE

	95,236	84,950	115,399	58,954	41,461
	3,149	3,685	4,087	3,215	2,757
	22,654	21,934	27,768	19,961	17,066
	3,637	8,229	7,112	3,193	2,837
	1,996	1,421	2,234	1,121	771
	126,672	120,219	156,600	86,444	64,892
	4,792	5,670	4,818	3,859	5,292
	1,233	1,477	1,556	1,002	1,297
	1,163	1,977	3,371	3,433	1,025
	14,011	18,839	25,685	15,476	13,202
	10,945	11,414	8,281	3,967	3,379
	8,371	8,903	8,895	4,466	4,707
	4,538	7,807	4,550	3,064	2,396
	45,053	56,087	57,156	35,267	31,298
	171,725	**176,306**	**213,756**	**121,711**	**96,190**
	595	286	983	2,215	3,988
	6,334	15,591	44,877	4,531	2,918
	3,755	4,522	6,759	3,072	1,375

1. Mostly container units. 2. Mostly for use with containers. 3. Separate axle and fifth wheel assembly for converting semi-trailer into full trailer in twin trailer doubles operations.
Source: Industry Div., Bureau of the Census, Dept. of Commerce. Compiled by CCJ Marketing Dept.

Truck trailers showed a modest decline in 1986 to 171,725 units. The most significant decline in 1986 shipments were for drop frame (56% decline) and platform (26% decline) which settled in around '82-'83 levels, indicating the slowing curve of a replacement cycle which peaked in '84. Detachable chassis also suffered a substantial decline of 59%. On the up side, closed top, dry freight vans closed 1986 up 10,286 units for a 12% gain.

TRENDS & STATISTICS

DIESEL ENGINES USED IN TRUCKS
(Factory sales from U.S. plants including exports)

468	–	40,889	–	–	–	41,357
2,261	–	58,878	–	–	1,128	62,267
15,281	7,199	7,232	60,049	–	6,482	96,243
18,673	9,765	12,509	74,675	–	3,848	119,470
5,403	11,707	266	–	–	–	17,376
3,621	13,747	341	–	–	–	17,709
4,225	4,226	19,056	–	–	14	27,521
5,236	6,081	24,993	–	–	576	36,886
1,484	19,428	456	35,737	–	–	57,105
640	18,949	956	36,198	–	–	56,743
–	–	–	–	–	4,469	4,469
–	–	–	–	–	3,330	3,330
4,013	6,266	102	–	–	–	10,381
3,177	7,404	220	–	–	–	10,801
53	164	7	–	16,873	17	17,114
156	806	53	–	23,966	159	25,139
–	–	–			4,721	4,721
–	–	–	–	–	4,516	4,516
5,780	4,390	112	–	–	–	10,282
5,109	5,975	238	–	–	–	11,322
2,256	7,558	796	–	–	518	11,128
2,348	6,251	1,964	–	–	645	11,208
209	657	109	–	–	–	975
284	608	99	–	–	–	991
37,688	42,167	68,569	60,049	16,873	16,221**	241,567
41,505	69,595	100,251	110,873	23,966	14,202	360,382

Source: Motor Vehicle Manufacturers Association.

**All Others includes: Isuzu, Mercedes-Benz, Volvo, Saab-Scania, Renault, Nissan, Mitsubishi. Reporting firms do not represent entire industry.

Left: The overall decline of truck sales reflects itself across the board in diesel engine sales. Hardest hit were International (46% decline), Cummins (39% decline) and Detroit Diesel (32% decline). Mack sales dipped 29.5%, while Caterpillar engine sales held up relatively well, dropping only 9%. Total decline registered 33% overall, taking diesel engine sales down below 1983 levels.

Below: This chart illustrates the six-year performance of Class 1 through 8 domestic factory sales. The Class 3 decline from 19,397 units to zero is wholly attributable to Ford, who states only that a "reclassification" was undergone. The difference may appear in Ford's Class 2 sales, which finished 44,915 units ahead of 1985's total.

Gains in Classes 1 and 5 accounted for the only increases for the year. Classes 6, 7 and 8 suffered a combined loss of 29,214 units, with Classes 6 and 8 hit hardest.

DOMESTIC TRUCK FACTORY SALES BY GVW

1,964,832	1,854,901	1,610,835	1,296,644	869,897	583,341
4,999	9,663	15,234	25,565	44,586	47,789
0.3%	0.5%	0.9%	2.0%	5.1%	8.2%
927,462	989,633	997,626	787,611	744,350	716,556
96,443	123,882	122,995	89,161	72,868	20,393
10.4%	12.5%	12.3%	11.3%	9.8%	2.8%
-	19,397	5	3	10	263
-	5,870	-	-	-	-
-	30.3%	-	-	-	-
5,749	5,123	5,502	1,143	1,333	1,843
-	-	-	-	-	-
-	-	-	-	-	-
17,846	25,810	29,273	24,310	22,533	50,762
9,265	14,253	13,789	9,703	8,559	19,336
51.9%	55.2%	47.1%	39.9%	38.0%	38.1%
77,597	81,122	74,445	48,896	48,568	41,503
47,694	50,492	43,412	29,468	26,282	27,851
61.5%	62.2%	58.3%	60.3%	54.1%	66.6%
103,216	120,941	138,584	78,575	68,040	94,958
102,671	120,311	137,692	78,008	67,453	93,789
99.5%	99.5%	99.4%	99.3%	99.1%	98.7%

TRENDS & STATISTICS

TRUCK FACTORY SALES AND TRUCKS WITH DIESELS

(U.S. domestic only; excluding tactical military vehicles)

780,224	178,912	103,457	770,878	–	–	142,381	–	–	–	–	–	–	1,984,832
2,388	1,009	–	1,622	–	–	–	–	–	–	–	–	–	4,999
727,426	177,868	116,213	648,315	–	–	187,079	–	–	–	–	–	–	1,854,901
5,529	2,200	–	1,935	–	–	–	–	–	–	–	–	–	9,663
329,230	93,339	35,630	453,010	–	–	17,244	–	–	–	–	–	–	927,462
34,670	7,263	–	54,310	–	–	–	–	–	–	–	–	–	96,443
367,782	98,437	76,314	408,095	–	–	19,625	–	–	–	–	–	3	969,633
49,106	10,776	–	64,000	–	–	–	–	–	–	–	–	–	123,882
–	–	–	–	–	–	–	–	–	–	–	–	–	–
–	–	–	–	–	–	–	–	–	–	–	–	–	–
–	–	–	19,397	–	–	–	–	–	–	–	–	1	19,397
–	–	–	5,870	–	–	–	–	–	–	–	–	–	5,870
–	–	–	–	–	–	–	–	–	–	–	–	–	–
–	–	–	–	–	–	–	–	–	–	–	–	–	–
–	–	–	–	–	–	–	–	–	–	–	–	4	–
–	–	–	–	–	–	–	–	–	–	–	–	–	–
248	5,491	–	–	–	–	–	–	–	–	–	–	–	5,739
–	–	–	–	–	–	–	–	–	–	–	–	–	–
349	4,774	–	–	–	–	–	–	–	–	–	–	5	5,123
–	–	–	–	–	–	–	–	–	–	–	–	–	–
2,230	2,821	–	5,582	–	5,286	–	–	–	1,880	–	–	–	17,848
120	1,179	–	791	–	5,286	–	–	–	1,880	–	–	–	9,265
3,288	3,032	–	7,751	–	9,646	–	–	–	2,083	–	–	–	25,810
413	765	–	1,337	–	9,645	–	–	–	2,083	–	–	–	14,253
8,157	18,293	–	27,711	–	23,280	–	–	–	2,176	–	–	–	77,597
1,803	5,958	–	15,296	–	23,280	–	–	–	2,176	–	–	–	47,894
11,540	15,588	–	33,279	–	19,815	–	–	–	1,919	–	–	–	81,122
3,880	6,935	–	18,933	–	18,815	–	–	–	1,919	–	–	–	50,492
419	6,959	–	10,351	16,832	20,825	–	10,219	15,842	–	9,807	10,999	972	103,216
77	6,841	–	10,257	16,832	20,825	–	10,219	15,842	–	9,807	10,999	972	102,671
798	10,581	–	13,937	17,580	20,931	–	10,637	23,333	–	10,996	11,173	977	120,941
565	10,474	–	13,767	17,580	20,779	–	10,637	23,333	–	10,996	11,173	977	120,311
1,099,545	303,906	139,087	1,276,542	16,832	49,371	159,625	10,219	15,842	4,065	9,807	10,999	972	3,096,992
39,438	22,251	–	82,278	16,832	45,371	–	10,219	15,842	4,065	9,807	10,999	972	261,072
975,305	275,116	193,488	1,109,912	17,773	52,859	268,194	10,637	23,333	4,012	10,996	11,173	977	3,096,927
64,631	38,485	–	98,834	17,773	50,859	–	10,637	23,333	4,012	10,996	11,173	977	324,471

Source: MVMA. Data is factory sales from U.S. plants only and does not include sales of vehicles resulting from joint venture agreements between foreign and domestic suppliers. Volvo White numbers include Autocar. Others include Marmon and Oshkosh. Reporting firms do not represent entire industry. Volvo White does not report separate factory sales figures for Class 8 Volvo, White and Autocar trucks (combined as 10,999 domestic units above). However, retail sales figures reported by Volvo White Truck Corp. show Class 8 White as 8,626 representing a 76% share, Autocar at 1,678 for 15% and Volvo at 1,057 for 9%. Total Volvo White retail sales Class 8 equals 11,361 units.

Total truck sales for all Classes were down slightly in 1986. In the heavy weight classes, Class 6 sales declined 30%, Class 7 dipped 4% and Class 8 dropped 14%.

The 30% decline in factory sales of Class 6 trucks was shared by every make, ranging from International's (Navistar) 23% decline (4,360 units) to Mercedes' 10% decline (204 units). International's Class 6 market share dropped 7.4%, while Mercedes' share increased slightly despite the loss in unit sales.

Ford and Chevrolet pulled Class 7 factory sales down 4% with the others experiencing minimal gains. The notable exception was that International's factory sales increased 4,445 (24%). International's Class 7 market share increased 6.7%. Ford's Class 7 market share dropped 5.3%.

In Class 8 GMC was off sharply 3,631 units (34%). Next was Mack, off 7,491 (32%), followed by Ford, down 3,586 (26%). Kenworth, International, Peterbilt and Volvo White suffered slight declines in 1986. Mack suffered the largest market share loss (4%), with Ford and GMC the only other market share losers. International registered the largest increase in market share, 2.8%.

PRIVATE FLEETS

By an overwhelming margin, private carriage is the dominant player in the U.S. trucking industry, based on the number of vehicles operated. Private carriage has become as complex as it is big. Using data collected by CCJ, these exclusive listings include a breakdown of types of vehicles the private carriers operate.

PRIVATE FLEETS

GENERAL INDUSTRY	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total	Average Mileage (000)	% Leased
Westinghouse Electric Corp	Pittsburgh, Pa.	2400	440	300	4400	0	7540	170	0
Honeywell, Inc	Minneapolis, Minn.	2629	0	0	4658	0	7287	120.4	100
Goodyear Tire & Rubber	Akron, Oh.	4000	100	100	2500	50	6750	NA	0
Wickes Companies, Inc	Santa Monica, Calif.	1073	412	1061	1484	1299a	5329	NA	60
Union Carbide Corp, Linde Div	Springfield, N.J.	10	400	500	3500	50	4460	NA	90
Air Products & Chemicals, Inc	Allentown, Pa.	340	500	1360	500	170	2870	48	0
L.L. Industries, Inc	Houston, Tex.	1046	155	523	1014	80	2818	52.4	10
National Linen Service	Atlanta, Ga.	1910	25	50	400	NA	2385	35	NA
Reliance Electric	Cleveland, Oh.	110	25	50	2100c	0	2285	NA	95
Ingersoll-Rand Co Ltd	Woodcliff Lake, N.J.	0	39	132	2010	NA	2181	43	100
Montgomery Ward & Co	Chicago, Ill.	1800b	0	0	120	0	1920	34	100
Lloyd S Pike Electrical Contractor	Mount Airy, N.C.	992	4	376	31	427	1830	NA	0
Kraft Brothers Corp	Delaware, Oh.	42	272	1351	126	0	1791	NA	0
Environmental Industries	Calabasas, Calif.	805	35	420	100	360	1720	NA	0
Trinity Industries	Dallas, Tex.	10	194	600	115	700	1619	13.9	9
American Hoechst Corp	Somerville, N.J.	93	12	68	1408	0	1581	40	97.7
Hewlett Packard, S Sales Reg	Atlanta, Ga.	0	0	0	1519	0	1519	27	0
American Greetings	Cleveland, Oh.	5	25	60	1400	0	1490	26	NA
American Linen Supply Co	Minneapolis, Minn.	1430	19	24	0	9	1482	21	0
West Point Pepperell Trans. Co.	West Point, Ga.	2	175	731	430	6	1344	18	100
Potlach Corp	San Francisco, Calif.	462	103	110	136	413	1224	NA	1.5
J W Wright Construction	Richmond, Va.	750	60	275	23	90	1198	NA	0
Caterpillar Tractor Co	Peoria, Ill.	300	60	365	450	0	1175	NA	72
Brad Ragan, Inc	Spruce Pine, N.C.	740	29	54	300	NA	1123	NA	0
Beckman Instruments	Fullerton, Calif.	18	2	5	1063	6	1094	40	100
Allenbrand Industries, Inc	Batesville, Ind.	275	215	508	79	7	1084	24.3	0
Scotty's Inc	Winter Haven, Fla.	375	40	180	39f	450b	1084	NA	NA
Liquid Air Ind, Gases Div	Walnut Creek, Calif.	5	220	690	106a	0	1021	17.8e	23
Scully-Miller Contracting Co	Long Beach, Calif.	569	111	226	66	30	1002	NA	9
Texas Industries, Inc	Dallas, Tex.	500	100	100	300	NA	1000	NA	40
Northrop Aircraft Div	Hawthorne, Calif.	305d	18	56	88	515d	982d	3.3	1
Rite Aid Corp	Harrisburg, Pa.	105b	90	150	600	2	947	6	0
Terminal Freight Handling Co.	Dallas, Tex.	55	261	622	2	0	940	18	0
Western Auto Supply	Kansas City, Mo.	0	240	494	164	0	898	16.4	0
Grossmans Div, Evans Products	Braintree, Mass.	175	24	68	185	385	837	8.5	22
Growmark, Inc	Bloomington, Ill.	5	123	679	0	0	807	10.5	7
Johnson Controls Battery Div	Milwaukee, Wisc.	0	234	570	0	0	804	13.3	0
Texas Juice, Inc	Wilmington, Del.	130	20	90	20	450	710	2	0
Linder Industrial Machinery Co	Lakeland, Fla.	40	4	4	90	570	708	5	0
Aluminum Co of America	Pittsburgh, Pa.	0	81	626	0	0	707	7.8	12
Continental Can Co	Oak Brook, Ill.	0	185	435	9	2	631	19.6	60
Union Camp Corp	Wayne, N.J.	0	152	318	0	0	470	NA	0
Dolbro Corp	Pittsfield, Me.	75	12	50	24f	250	411	NA	3
Lance Industries Inc	Atlanta, Ga.	45	55	98	75	5	278	NA	95

* – does not include cars; a – light trucks; b – includes vans; c – includes light trucks; d – includes some miscellaneous equipment; e – trucks only; f – light pick-ups; NA – not available

PRIVATE FLEETS

LEASE/RENTAL	Headquarters	Trucks	Trailers				
Peterson, Howell & Heather	Baltimore, Md.	66,000	e	4,000	170,000	8000	248,000
Ryder Truck Rental	Miami, Fla.	56,441	27,563	21,814	2070	NA	107,974k
D & K Financial Corp.	Lincolnshire, Ill.	23,500	2500	4500	70,000	NA	100,500
Land Lease	Minneapolis, Minn.	800	5900	1100	58,000	0	65,800
Enterprise Leasing Co	St. Louis, Mo.	3200	250	0	58,000	200	61,650
Automotive Rentals, Inc.	Maple Shade, N.J.	400	630	800	43,250	NA	45,080
Geico TIP Trailer Leasing	Bala Cynwyd, Pa.	0	0	36,000	0	0	36,000
Hertz-Penske Truck Leasing	Reading, Pa.	14,400	8000	5300	3000	0	30,700b
McDonnell Douglas Financial Group	Long Beach, Calif.	3000	2800	15,000	4000	500	25,300
Amtralease	Cherry Hill, N.J.	7769	10,188	5755	700	0	24,412
Transamerica Trailer Services	Piscataway, N.J.	0	0	20,000	0	0	20,000
NationaLease	Chicago, Il	9500	13,750	NA	0	0	23,250
Rollins Leasing Corp	Wilmington, Del.	3100	6300	4600	0	0	14,000
All-State Vehicles, Inc	Long Island City, N.Y.	800	0	0	13,000	0	13,800
Ruan Trans. Mgt. Systems	Des Moines, Ia.	620	5515	6010	1000	0	13,145
Geico Truck Leasing	Chesterfield, Mo.	3273	5809	3461	0	0	12,543
AJF Leasing	St. Louis, Mo.	0	0	12,000	0	0	12,000
Trucklease Corp	Worcester, Mass. (j)	2397	1268	835	6000	0	10,500
Transamerica Corp (d)	San Francisco, Calif.	240	0	6875	2480	0	9595
Chancellor Fleet Corp	Boston, Mass.	202	2728	4864	0	861	8655
Farm Credit Leasing Services	Minneapolis, Minn.	1812	1302	2841	2408	91	8454
PLM Transportation Equipment	San Francisco, Calif.	0	260	7716	0	0	7976
Whiteford Systems	South Bend, Ind.	135	2183	2420	0	0	4738
PACCAR Leasing Corp.	Bellevue, WA	336	2506	463	0	0	3305
Immke Circle Leasing	Columbus, Oh.	120	0	5	3135	0	3260
Transportation Leasing Co	Tulsa, Okla.	960	40	48	1980	18	3046
Leslie Leasing Co	San Francisco, Calif.	650	40	55	2100	0	2845
Lily Truck Leasing Corp	Boston, Mass.	1155	754	727	40	5	2681
Mendon Leasing Corp	Brooklyn, N.Y.	2300	e	0	300	0	2600
Phill Baumgarten Motors, Inc (g)	Ft. Lauderdale, Fla.	121	703	1411	76	0	2311
Transervice Lease Corp	Lake Success, N.Y.	1200	262	581	56	120	2219
United Truck Leasing Corp	Braintree, Mass.	1138	765	252	40	0	2195
UPS Truck Leasing	Greenwich, Ct.	1000	1000	100	0	0	2100
Transportation Leasing Company	Tulsa, Ok.	750	20	21	1230	14	2035
Action Mobile Office Rental	Carson, Ca.	8	7	1900	60	6	1927
Edart Truck Rental Corp	Hartford, Conn.	650	600	500	50	2	1802
DeCarolis Truck Rental	Rochester, N.Y.	410	162	815	20	5	1412
Highway Leasing Co	Needham, Mass.	92	561	734	0	0	1387
Salem Leasing Corp	Winston-Salem, N.C.	79	441	689	0	0	1209
Gordon Thompson Industries	Jacksonville, Fla.	12	10	0	1100	0	1122
HUB Truck Rental, NY Reg	Farmingdale, N.Y.	825	107	0	20	0	952
Doerrs Trailer Leasing (f)	Orlando, Fla.	NA	3	890	1	2	896
Rice & Holman Leasing	Pennsauken, N.J.	316	0	0	567	0	883
Lease Line, Inc	N. Brunswick, N.J.	66	148	643	18	4	879
Commercial Equipment Co	Charlotte, N.C.	4	293	432	3	0	732
Hunsaker Truck Lease, Inc	Dallas, Tex.	120	260	240	0	0	620
Carpet Center Leasing	Dalton, Ga.	17	216	355	9	0	570
Clark Truck Leasing	Camden, NJ	315	122	42	5	0	484

a – does not include foreign-based vehicles; b – plus approximately 12,000 units acquired with buyout of leasing operations of Leaseway; d – does not include Budget Rent-A-Car or Transamerica Interway trailer leasing; e – included in "Trucks;" f – regional fleet figures, not national; g – includes leasing division and vehicles operated by Baumgarten Transportation Co. Inc.; j – Trucklease cars controlled by Auto Rental Corp. Both are subsidiaries of Automotive Management, Inc.; k – Includes 86 buses. NA – not available.

PRIVATE FLEETS

FOOD	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	% Leased
ARA Services (a)	Philadelphia, Pa.	4872	2580	5900	2932	1102	17,386	423.2	.08
Continental Baking	St. Louis, Mo.	9015	720	756	404	12	10,907	181.7	48
Pepsi-Cola Bottling	Purchase, N.Y.	2600	2400	3000	800	1200	10,000	100	10
Nabisco Brands, USA	East Hanover, N.J.	1500	57	119	5000	0	6676	133	3
Kraft, Inc.	Glenview, Il.	475	525	710	4500	0	6210	10.3	70
Safeway Stores	Oakland, Calif.	23	1542	3487	NA	362	5414	94	0
Fleming Companies	Oklahoma City, Okla.	118	1462	2536	870	0	4986	96	2.3
Interstate Brands Corp	Kansas City, Mo.	4005	393	498	5	0	4901	98	0
Super Valu Stores	Minneapolis, Minn.	15	1070	2347	765	93	4290	75	0
General Cinema Beverages	Chestnut Hill, Mass.	2100b	300	360	310	430	3500	34	NA
The Southland Corp	Dallas, Tex.	927	877	1064	0	0	2868	61	11
Entenmann's Orowcat	Bay Shore, N.Y.	2098c	211	250	268	37	2864	12	0
American Bakeries Co	New York, N.Y.	2300	224	325	NA	0	2849	54	6
Land O'Lakes, Inc	Minneapolis, Minn.	450	235	500	900d	500	2585	NA	80
Wetteran, Inc	Hazelwood, Mo.	20	628	1168	650	2	2468	31	1
Wakefern Food Corp	Elizabeth, N.J.	0	450	1500	250	0	2200	25	f
General Foods Corp	White Plains, N.Y.	0	55	170	1975	0	2200	6e	24
Stroehmann Bakeries, Inc	Williamsport, Pa.	1213	218	396	208	0	2035	40	30
Holly Farms Poultry Ind	Wilkesboro, N.C.	188	446	822	188	300	1944	40	100
Tyson Foods, Inc	Springdale, Ariz.	127	393	705	456b	190	1871	26	.24
Giant Food, Inc	Landover, Md.	300	200	1200	20	4	1724	12	0
Campbell Taggart, Inc	Dallas, Tex.	50	658	850	100	0	1658	42	30
Arnold Foods	Greenwich, Conn.	1200	95	120	180	NA	1595	38	10
Acme Markets	Philadelphia, Pa.	4	270	1000	150	0	1424	12	NA
Stop & Shop Companies	Boston, Mass.	2	158	1025	85	0	1270	41	NA
Hartz Mountain Corp	Harrison, N.J.	750	23	30	450	0	1253	NA	100
Beverage Management	Columbus, Oh.	569	165	227	256	0	1217	22	.03
Beatrice Foods, Bottled Water Div	Los Angeles, Calif.	892	52	79	79	104	1206	39.4	60
H.E. Butt Grocery Co	Corpus Christi, Tex.	11	213	732	189	0	1145	30.5	0
Houston Coca-Cola Bottling	Houston, Tex.	508b	188	225	60	160	1141	12	0
Thomas J Lipton, Inc	Englewd. Cliffs, N.J.	58	1	6	950c	0	1015	NA	0
Martin Brower Co	Des Plaines, Ill.	0	365	584	31	NA	980	42	85
Northrup King Co	Minneapolis, Minn.	25	1	2	450b	350	828	14	0
Metz Baking Co	Sioux City, Ia.	668	67	79	2	0	816	18	0
Drake Bakeries, Inc	Wayne, N.J.	620	18	41	47	0	726	9.3	0
Vons Grocery Co	El Monte, Calif.	49	190	466	0	0	705	13	0
Central Soya Co	Fort Wayne, Ind.	62	96	187	191	164	700	9.4	86
Sweet Life Foods	Suffield, Conn.	0	117	300	257	7	681	5	0
United States Sugar	Clewiston, Fl.	513	12	33	91	2	651	NA	NA
Swift-Eckrich, Inc.	Quincy, Mi.	281	36	63	230	0	610	21	40
Chas Freihofer Baking	Troy, N.Y.	428	26	64	62	18	598	9.7	0
Mana Pro Corporation	Los Angeles, Calif.	124	114	204	131	NA	573	6.1	1
Pepperidge Farm, Inc	Norwalk, Conn.	15	101	154	277	3	550	15.5	100
Dial Corp	Phoenix, Ariz.	0	42	130	250	0	422	3.1	100

* – does not include cars; a – includes Smith's Transfer and magazine/book division; b – includes pick-up trucks; c – includes vans; d – includes light trucks; e – trucks only; f – 100% of tractors & 20% of trailers; NA – not available

PRIVATE FLEETS

PUBLIC UTILITIES		Straight Trucks			Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	% Leased
GTE Service Corp	Irving, Tex.	25,700c	150	725	8410	NA	34,985	380	8
AT&T Information Services	Basking Ridge, N.J.	5401c	74	347	19758	NA	25580	NA	NA
Bell South Corp.	Atlanta, Ga.	19,252	89	150	5294	NA	24,785	25.5	0
Southwestern Bell Telephone	St. Louis, Mo.	14,800c	12	NA	4200	0	19,012	172	0
Pacific Gas & Electric	San Francisco, Calif.	9289	100	3913	3016	230	16,548	NA	0
Pacific Bell	San Francisco, Calif.	11,705c	28	28	2392	NA	14,153	NA	0
Florida Power & Light	Miami, Fla.	2914c	43	980	4174	487	8598	NA	NA
Southern California Edison	Pomona, Calif.	3553	80	1087	1967	813	7500	60	100
New England Telephone	Boston, Mass.	5661c	0	0	1707	0	7368	69	14
American Elec. Power System	Columbus, Oh.	4130	45	130	2040	510	6855	68	98
Southern California Gas Co	Los Angeles, Calif.	4506	12	298	1296	570	6682	52	100
Duke Power Co	Charlotte, N.C.	2800	77	1150	1150	1050	6227	64	0
LA Dept Water & Power	Los Angeles, Calif.	3200	53	329	1280	1010	5872	51	9
General Public Utilities	Parsippany, N.J.	2667	26	1148	1292	673	5806	51	75
Public Service Elec & Gas	Newark, N.J.	2422c	10	662	1760	528	5382	37.1	0
Consumers Power Co	Jackson, Mich.	2874	40	872	662	510	4958	37.8	NA
Niagara Mohawk Power Corp	Syracuse, N.Y.	2654	27	906	710	486	4783	39	88
Commonwealth Edison	Maywood, Ill.	1907	46	709	1594	182	4438	45	1
Con Edison of NY	Astoria, N.Y.	2576	25	199	1100	433	4333	5	0
N Indiana Public Service	Hammond, Ind.	1617	20	680	535	784	3636	19	8
Columbia Gas Distribution	Columbus, Oh.	1873	8	214	888	611	3594	41	100
Northern States Power Co	Minneapolis, Minn.	1855	11	622e	1003	16	3507	14	0
S New England Telephone	New Haven, Conn.	1871	7	200	1212	NA	3290	27.8	0
Arizona Public Service Co	Phoenix, Ariz.	1710	20	475	712	285	3202	31	5
ARKLA, Inc	Shreveport, La.	1480	33	748	292	603	3156	NA	0
Pennsylvania Power & Light	Allentown, Pa.	1250	16	650	888	230	3034	0	100
Public Service Co of CO	Denver, Colo.	1599	17	545	413	351	2925	23.1	0
Long Island Lighting Co.	Hicksville, N.Y.	1394	13	427	683	367	2884	11	0
Detroit Edison	Detroit, Mich.	1500	60	600	400	225	2785	30	90
Philadelphia Electric	Berwyn, Pa.	1416	22	473	737	23	2671	16	100
Central Telephone Co	Chicago, Ill.	1819	0	60	675	20	2574	25.9	0
San Diego Gas & Electric	San Diego, Calif.	1326	60	284	660	133	2463	24	0
New York State Elec. & Gas	Binghamton, N.Y.	1314	14	303	471	294	2396	20,5	63
Baltimore Gas & Electric	Baltimore, Md.	1466	17	33	871	0	2387	22	12
Illinois Power	Decatur, Ill.	1028	5	480	354	396	2263	13	0
General Telephone of NW	Everett, Wash.	1363c	11	88	651	0	2113	19.6	3
Jersey Central Power & Light	Morristown, N.J.	948b	8	522	370	183	2031	21	66
Appalachian Power Co	Roanoke, Va.	1108c	7	273	418	224	2030	22	98
Northern Illinois Gas	Naperville, Ill.	989	3	215	497	281	1985	24	0
Salt River Project	Phoenix, Ariz.	1139	18	213	309	275	1954	16.1	0
Cincinnati Gas & Electric	Cincinnati, Oh.	826	12	228	518	276	1860	14	0
Oklahoma Gas & Electric	Oklahoma City, Okla.	940	25	322	222d	325	1834d	16	0
Pacific Power & Light	Portland, Ore.	1176	8	337	245	24	1790	14.6	85
Illinois Bell Telephone Co	Springfield, Ill.	255	96	406	943	0	1700	NA	0
Public Service Indiana	Plainfield, Ind.	735	9	440	312	145	1691	15.5	86
Memphis Light, Gas & Water	Memphis, Tenn.	825	10	185	215	398	1633	11	0
Michigan Consolidated Gas	Detroit, Mich.	896	6	103	490	128	1623	19	0

* – does not include cars. a – includes vans. b – includes 464 pick-up trucks. c – includes vans and light trucks. d – does not include contract cars. e – does not include semi-construction equipment. NA – not available.

PRIVATE FLEETS

CITY GOVERNMENT#								
Baltimore, Md.	2700fp	15	25	2000b	400	5140	NA	0
Austin, Tex.	953	38	134	1385b	2652	5126	NA	NA
Phoenix, Ariz.	2003e	152	297	1528c	447a	4427a	34.6	0
Dallas, Tex. Equip Services Dept	1845	48	137	1568	423	4063c	48.4	.003
San Francisco, Calif.	911	31	18	1050b	1404	3414	NA	0
Cleveland, Oh.	1182	6	157	1071	718	3134	16	0
Austin, Tex.	1095e	61	180	808c	540	2684	9.5	0
San Antonio, Tex.	1109	35	44	822	404	2414	35	0
Kansas City, Mo.	1123	59	27	620	402	2231	NA	0
Baton Rouge, La.	611	5	43	836	145	1640	NA	1
Long Beach, Calif.	588	4	78	640	252	1562	NA	0
Sacramento, Calif.	342	5	200	808	150	1505	11.3	0
San Diego, Calif.	1080	75	75	90	150	1470j,l	13	0
San Jose, Calif.	487	31	66	518	364a	1466b	12.3	0
Honolulu, Hi.	640	20	70	500	220	1450	NA	0
Norfolk, Va.	560	2	26	415	382	1385	9	0
Corpus Christi, Tex.	687	115	70	346	141	1359	12.7	0
Charlotte, N.C.	365	2	2	833	141	1343	15.5	0
Anaheim, Calif.	370	1	93	318	534	1316	5	2
Salt Lake City, Ut.	320	235	40	400b	297	1292	7	0
Lexington, Ky.	367	58	38	544	277	1284	9	0
Clearwater, Fla.	397	11	56	310	498	1272a	4	0
Greensboro, N.C.	225g	2	119	573a	279b	1198	10.5	0
Tallahassee, Fla.	586	8	109	255	216	1174	9.1	0
Shreveport, La.	300	15	16	450	350	1131	NA	0
Louisville, Ky.	348	77	42	664	0	1131	NA	NA
Newport News, Va.	497	2	86	367	164m	1116	NA	0
Jackson, Miss.	450	20	20	500	125	1115	NA	0
Lubbock, Tex.	237e	50	169	361b	287	1104	7	0
Orlando, Fla.	407	63	138	396	28	1032	NA	0
Ft. Lauderdale, Fla.	361	16	177	400	47	1001	4.2	0
Raleigh, N.C.	426	1	73	335	155	990	8.4	.1
L.A. Calif. Fire Dept	513	75	75	304	10	977	NA	0
Riverside, Calif.	470	2	90	232	167	961a,b,c	NA	0
El Paso, Tex.	565	17	18	50	280a,h	930	NA	0
Winston Salem, N.C.	359	3	27	388	121	898	7.1	0
Knoxville, Tenn.	366	5	22	347	117	857	14	54
Rochester, N.Y.	345	1	29	360	95	830	7	0
Pontiac, Mich.	175	1	28	102j,l	488a	794,c,d	NA	.007
Savannah, Ga.	358	1	1	318	88	766	NA	0
Roanoke, Va.	323	8	33	209	189	762k,o	NA	0
Montgomery, Ala.	355	1	2	316	73	747a	NA	0
Little Rock, Ark.	323	2	12	269c	135	741	5.4	0
Hampton, Va.	289	2	13	240b	150	694a	NA	0
Portsmouth, Va.	182	35	49	267b	140	673j,k	NA	0
Midland, Tex.	125	2	5	200	60	392	NA	0

* – does not include cars; # – may not include all departments; a – includes miscellaneous vehicles; b – includes police fleet; c – includes motorcycles; d – does not include education or fire dept; e – includes fire trucks; f – includes 340 light trucks; g – does not include water or fire dept; h – does not include fire, police, health or water depts; i – does not include public transit or fire dept; j – does not include fire dept; k – does not include school bus fleet; l – does not include police dept; m – includes street maintenance equipment; n – includes 59 vans and 9 ambulances; o – does not include transit; p – includes 300 school buses; NA – not available.

PRIVATE FLEETS

STATE GOVERNMENT#	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	*Annual Mileage (millions)
North Carolina DOT/Hwy Div	Raleigh	5542	101	862	0	11,641	18,146	65
Texas Hwy & Public Trans	Austin	6696	112	106	1147	9402	17,463	106
California DOT	Sacramento	4733	75	295	3069	4186	12,358	NA
Massachusetts Motor Vehicle Management Bureau	Boston	3486	0	0	3311	2628	9425	NA
Pennsylvania DOT	Harrisburg	4362	58	238	676	3836	9170	NA
Virginia Hwy & Trans Dept	Richmond	3837	55	69	2700	2494	9155	NA
Georgia DOT	Atlanta	1389	54	375d	632	6521	8971	NA
Florida DOT	Tallahassee	3004	63	400	1192	2586	7245	75
Kentucky Trans Cabinet	Frankfort	4682c	26	34	1792	141	6675	70e
Michigan Management/Budget Dept, Motor Trans Div	Lansing	1471	16	6	5134	11	6638	NA
NJ DOT	Trenton	1189	6	7	712	4645	6559	25
Arkansas Hwy. Trans. Dept.	Little Rock	2713	68	29	290	3000	6100	36
Missouri DOT/Hwy Dept	Jefferson City	2518b	14	14	643	2815	6004	NA
New York DOT	Albany	3500	68	68	800	1500	5936	30
Oregon DOT/Hwy Div	Salem	964	32	291	1372c	2364	5023	34
South Carolina Hwy/Public Trans	Columbia	2611	162	349	1664	0	4786	NA
Alaska DOT	Juneau	2626c	23	116	657	1021	4443	NA
Indiana Hwy Dept	Indianapolis	1234	30	25	2143b	950	4382	40
Iowa DOT	Ames	2112	12	12	507	886	3529	22
Colorado Dept. Highways	Denver	1970b	24	331	322	793	3440	NA
Illinois DOT	Springfield	1989	13	300	848	0	3150	95
Kansas DOT	Topeka	1485c	17	71	234	1147	2954	NA
North Dakota Hwy. Dept.	Bismarck	330	16	16	525	2000	2887	23
D.C. Dept of Pub Works	Washington	1733	26	409	355	111	2634	1
New Mexico Hwy. Dept.	Roswell	785	65	561	339	858	2608	NA
Arizona DOT	Phoenix	589	17	248	1328b	328	2510	24
Tennessee Dept. Gen. Ser.	Nashville	258	15	0	1604b	413	2290	35
Maryland Hwy Admin	Baltimore	950	14	16	250	1000	2230	NA
Minnesota DOT	St. Paul	1000a	40	150	310	700	2200	8.5
West Virginia Hwy Dept	Charleston	847	17	167	413	626	2070	NA
Mississippi Hwy. Dept.	Newton	1518	47	174	248	45	2032	10
Connecticut DOT	Wethersfield	1289	13	13	420	266	2001	NA
Montana Hwy Dept	Helena	980	61	141	125	498	1805	15
Utah DOT	Salt Lake City	1077c	12	84	215	399	1787	22
Wisconsin Dept of Admin	Madison	5	0	0	1600	0	1605	35
South Dakota DOT	Pierre	825	9	70	120	502	1526	NA
Maine DOT/Motor Trans Ser	Augusta	600	12	200	421	250	1483	NA
Alabama Dept. Pub. Safety	Montgomery	20	5	0	1200	0	1225	NA
Washington Dept. Nat. Resources	Olympia	616	7	160	251	128	1162	9.2
New Jersey Turnpike Auth.	Hightstown	350	4	81	250	450	1135	NA
Idaho DOT	Boise	918a	20	73	114	0	1125	13
Nebraska Dept. Roads	Lincoln	525	67	53	325	0	970	NA
Delaware DOT	Dover	540a	11	12	229	175	967	NA
New Hampshire Hwy Pub Works	Concord	507b	2	8	218	131	866	10
Hawaii DOT	Honolulu	272	7	30	114	62	485	NA
Louisiana DOT	Monroe	265	5	11	26	145	452	NA
Nevada DMV, Hwy Patrol	Carson City	22c	0	8	253	4	287	5

* – does not include cars; # – may not include all departments; a – includes pickup trucks; b – includes pick-ups and vans; c – includes pick-up trucks, vans and miscellaneous vehicles; d – includes 225 utility trailers; e – includes cars; NA – not available.

PRIVATE FLEETS

PETROLEUM	Headquarters	Straight Trucks	Tractors	Trailers	Cars	Off Highway	Total Vehicles	Annual Mileage (millions)	% Leased
Phillips Petroleum	Bartlesville, Okla.	2972	160	684	689	1547	6052	NA	0
Tenneco, Inc	Houston, Tex.	2300b	200	450	2900	125	5975	NA	85
Dowell Schlumberger	Houston, Tex.	1072	918	1374	2000a	NA	5364	6.0	NA
Conoco Inc	Houston, Tex.	2000	365	650	1000	800	4815	NA	0
Petrolane, Inc	Long Beach, Calif.	2445	123	180	80	0	2828	NA	14
Arco Oil & Gas	Dallas, Tex.	984	47	361	731	530	2653	34.6	0
Exxon Co USA	Houston, Tex.	295	281	275	700	0	1551	28.7	0
Chevron USA	San Francisco, Ca.	30	116	430	700	0	1276	NA	0
Texaco Refining & Mkt, Inc	Houston, Tex.	74	148	201	804	NA	1227	34.5	100
Natural Gas Pipeline Co of Am	Lombard, Ill.	584	139	117	301	0	1141	17	0
Weltech, Inc	Houston, Tex.	475	46	50	25	470	1066	20.2	37
Amerigas, Inc	Valley Forge, Pa	350	150	225	335	0	1060	22	65
Transco Energy Co	Houston, Tex.	450	12	100	325	50	937	13	0
Sun Refining & Mkt Co	Philadelphia, Pa.	75	180	275	400	NA	930	20	15
Mobil Oil Corp (c)	Fairfax, Va.	50	310	410	0	160	930	22.0	5
Big Three Industries, Inc	Houston, Tex.	133	131	357	220	80	921	NA	0
Halliburton Services	Wichita, Kan.	70	170	312	87	86	725	NA	0
Meenan Oil Co	Wantagh, N.Y.	490	40	35	94	6	665	NA	0
Union Oil Western Region Mkt	Los Angeles, Calif.	68	80	90	360	0	598	17	0

* – does not include cars; a – includes pick-up trucks; b – includes light trucks and vans; c – marketing dept only; NA – not available

FEDERAL GOVERNMENT*	Trucks & Tractors	Cars & Station Wagons	Ambulances	Buses	Total Vehicles
US Postal Service	123,600	12,187	0	10	135,797
General Services Administration (a)	36,607	51,633	158	3705	92,103
Air Force	44,296	5828	1260	2297	53,681
Army	35,264	10,671	1023	2969	49,927
Agriculture Department	26,786	4241	1	45	31,073
Navy	22,676	3104	606	1011	27,397
Justice Department	3287	11,449	7	135	14,878
Interior Department	12,695	1843	11	223	14,772
Department of Energy	10,761	1967	57	268	13,053
Treasury Department	1122	6979	1	12	8114
Marine Corps	5995	660	0	333	6988
Civil Works, Corps of Engineers	6089	850	4	18	6961
Tennessee Valley Authority	2412	1380	14	0	3806
State Department	1248	942	8	0	2198
Labor Department	1324	354	17	50	1745
National Aeronautics & Space Admin	993	201	13	11	1218

a – most vehicles are in Interagency Motor Pool and rented or leased to other government fleets. There is no duplication with other fleets listed; * – source: General Services Administration Report, printed 1986.

Attention Private Carriers:

Companies that operate 300 or more vehicles and wish to be considered for inclusion in CCJ's 1987 list of private fleets should mail a self-addressed envelope to: Fleet List, CCJ, Chilton Way, Radnor, Pa. 19089-0060. Your return envelope will be used to forward a questionnaire. Carriers wishing to participate in the next PTCA-sponsored study of private fleet costs should contact The Private Truck Council of America, Inc., 2022 P St., N.W., Washington, D.C. 20036.

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CHILTON'S AUGUST 1987

CCJ

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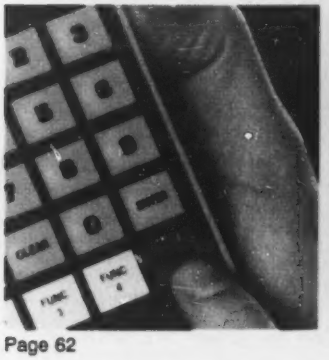

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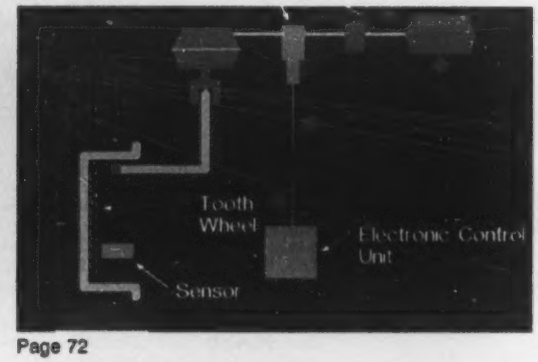

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PTCA Cost Index Survey is guide for private fleets

Washington, D.C. – The average cost of operating a private fleet of vans and/or straight trucks is $2.13 per mile; $1.38 per mile for a tractor-trailer fleet; and $1.62 for a mixed fleet. Those figures were generated from the Private Truck Council of America's 1986 Cost Index Survey.

Some of the driver cost items in the survey are:

- Union drivers for company-owned fleets make an average of 15¢-per-mile more than nonunion drivers.
- In leased fleets, union drivers make 25¢-per-mile more than nonunion (73¢-per-mile vs. 48¢).
- Average hourly wages for union drivers in company-owned fleets are $11.31.
- Average tractor age is five years; seven years for straight trucks.

This is the sixth annual survey of private fleet operating costs sponsored by the PTCA. Richard Henderson, executive vice president, said the 1986 survey represents a major effort to improve the sampling base, methodology and credibility of the Cost Index. The 1986 survey sampled 2,962 fleets and 577 responded (20%).

While the results of the 1986 Cost Index differ little from previous years, Henderson said they are more reliable than in the past. One reason for that is the response rate quadrupled to 20% in 1986 from 5% in 1985.

"We took a different approach in 1986 in that we changed vendors to Chilton Research Services (CRS), the same outfit that does the ABC news polls," Henderson said.

The previous vendor was A.T. Kearney, a Chicago-based management consulting firm. "Kearney did a good job," Henderson added. "[They got] a very difficult project off the ground. But we found ourselves at the point where we needed to place the Cost Index in the hands of a professional research establishment that could improve the methodology and the reliability of the information."

Private fleet operators typically do not reveal operating cost data, making it extremely difficult to compare the efficiency of their operations with similar ones. The PTCA Cost Index measures a number of critical cost items, and is reportedly the only available resource that private fleet managers can use as a point of reference to compare operating costs.

"We recognized that it was time to make some changes if the study was ever to be the valuable resource for private fleet managers that it has the potential of becoming," Henderson said.

CRS research account executive Robert J. Thomas said: "This year's survey is the first step in building a cost data base that will be of greater value to managers of private fleets." While the numbers look similar to those of previous Cost Indexes, Thomas warns against comparing 1986 with previous years, "because the 1986 survey used scientific sampling methodology, making the respondent base more representative of all private fleets as a group.

"The 1986 survey is a good, solid baseline for future surveys, which will include up to 10 vocational breakouts," Thomas said. "Vocational breakouts will provide for the first time a reliable source of numbers for private fleet managers to compare fleet operating costs to 'like' operations."

The 1986 survey provides statistics by: type of equipment operated; type of tractor-trailer fleet (van, tanker, refrigerated, flat bed); by fleet size; by geographic region; driver affiliation; and equipment owned or leased.

Survey cost is $225 for PTCA members, and $285 for non-members. Customized reports from the data base are available at additional cost. Contact CRS at 215-964-4653. □

OPERATING STATISTICS

	Total	Tractor/ Trailer	Straight Truck/Van	Mixed
Total miles driven	1,209,199,000	671,373,000	427,191,000	110,635,000
Average miles per trip	551	778	288	480
Total number of tractors	10,299	7,174	1,359	1,766
Total number of straight trucks/vans	18,905	121	17,772	1,012
Trailer to tractor ratio	2.3	2.5	–	1.9
Average tractor age	5 years	4 years	–	6 years
Average straight truck age	7 years	–	6.5 years	7 years
Average tractor mpg	6	6	–	6
Average straight truck mpg	7	–	7	7
Average power units per mechanic	13.3	6.1	17.8	8.4
Union/nonunion fleets	215/296	96/162	95/129	24/57
Leased/owned equipment	152/336	137/81	11/194	4/61

Definitions of terms: Tractor/trailer fleet: the number of tractors is greater than or equal to 80% of the fleet's total vehicles. Straight truck/van: the number of straight trucks/vans is greater than or equal to 80% of the fleet's total vehicles. Mixed fleet: all fleets which do not fit the defintion of tractor/trailer or straight truck/van fleet. Owned equipment: 80% or more of the fleet's power units are owned. Leased equipment: 80% or more of the fleet's power units are leased.

Circle 16 on Inquiry Card

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CHILTON'S SEPTEMBER 1987

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COMMERCIAL CARRIER JOURNAL

Troubleshooting Brake Balance

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Product Evaluation: Volvo "FE"

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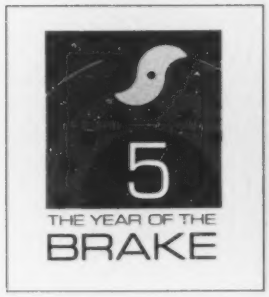

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Boston truckers and realtors battle

Boston, Mass.—Real estate and trucking interests in this 200-year-old city are at loggerheads in a battle over turf, and the trucking industry appears to be losing.

At stake is residential and commercial real estate development around the port of Boston, a major cargo and freight facility serving the entire New England area.

Kevin Kiley, Massachusetts Motor Truck Assn. director, said there are 17 major construction projects ready to begin and 10 more on drawing boards, all of which will effectively block truck access to the port. The development means truckers are being pushed aside or pushed out as rising real estate values associated with the port play a dominant role in the area's future.

Steven Jones, president of BFT Trucking, Inc., one of the city's largest truck terminal operators, said: "We're all being pressured out of the city."

Jones has less than 18 months on his terminal's lease, which covers 5.5 acres. The lease is held by a real estate developer, and Jones does not expect it to be renewed.

Don Eldridge, president of Hebden and McKenzie Transport Co., East Boston, said he has moved his operation three times in two years and may now have to leave the city because of escalating rents and development pressures.

"They're trying to push all the truckers out of the city. To be in South Boston, you've got to be a Philadelphia lawyer," said Manwell Souza, owner of Rea's Express.

Jones said if truckers are forced farther and farther away, drayage at the port will become a thing of the past, and cargo will bypass Boston in favor of New York.

"Not just my business, but the whole port of Boston is in real jeopardy. If the trucks cannot get to and from the port, they might as well be nonexistent," he said.

Boston officials are reportedly working with the MMTA, truckers and area neighborhoods to establish new truck routes. But truckers say they also need a new terminal area or drop-off sites that are protected against future residential and commercial real estate development.

The Massachusetts Port Authority, better known as Massport, holds some real estate around the port of Boston, and trucking and shipping interests hope Massport will make some of that land available for terminal space.

Truckers have to be protected, says Massport Maritime director Anne Aylward. But Ms. Aylward said the International Longshoremen's Association has the right to assert jurisdiction over Massport property, but that means a substantial increase in the cost of trucking services, which Boston truckers cannot afford. □

A Correction

Overland Express, Indianapolis, Ind., was ranked 55th in the listing of the Top 100 for-hire carriers in CCJ's July 1987 issue. In the story that accompanied the Top 100 ranking, however, Overland Express was incorrectly noted as being unlisted.

In 1986, Overland Express lost $16.1 million on revenues of $99.3 million. In 1985, the company was ranked 56th in the Top 100.

CCJ regrets the error. □

DOT, Congress act to tighten 'hazmat' regs

When the 1974 hazardous materials transportation law is updated later this year or next, the new rules probably will strengthen the federal government's role in regulating hazmat shipments and diminish the impact of state regulations.

The Department of Transportation (DOT) is proposing to require motor carriers hauling "extremely hazardous" materials to have a federal permit. DOT has not yet defined "extremely hazardous."

States would be preempted from shipping papers, placarding, and regulation packaging requirements, but could regulate routing and require local permits as long as their standards are consistent with DOT standards. Federal officials estimate that about 1,000 carriers would have to get permanent federal hazmat permits.

On a related front, Rep. Cardiss Collins (D-Ill.) is sponsoring legislation that would establish a $100 million annual fund to train and equip local hazmat response teams, financed by a .1¢ tax on motor fuels; require hazmat shippers and transporters to register with DOT and pay a fee to cover the costs involved; provide federal grants to states and local areas to designate hazmat routes and safe havens for parking such loads under DOT guidelines; and impose a minimum $500 fine for non-compliance with federal regulations. □

Federal law on alcohol use now reaches into truck cab

From CCJ's Washington Bureau

Under a regulation adopted by the Federal Highway Administration, a commercial vehicle driver may now be put out of service for 24 hours if found to have used alcohol while on duty or within four hours of going on duty.

Issued under the law that establishes the single commercial driver's license, the regulation marks the first time federal regulations banning alcohol use have reached into the cab, according to the American Trucking Associations. While federal regulations have banned alcohol consumption, enforcement was left up to police.

Now, federal or state roadside safety inspectors can place a driver out of service if alcohol usage is detected. A cited driver must notify his employer and the state which issued his commercial driver's license. □

CHILTON'S OCTOBER 1987

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1988 BUYER'S GUIDE

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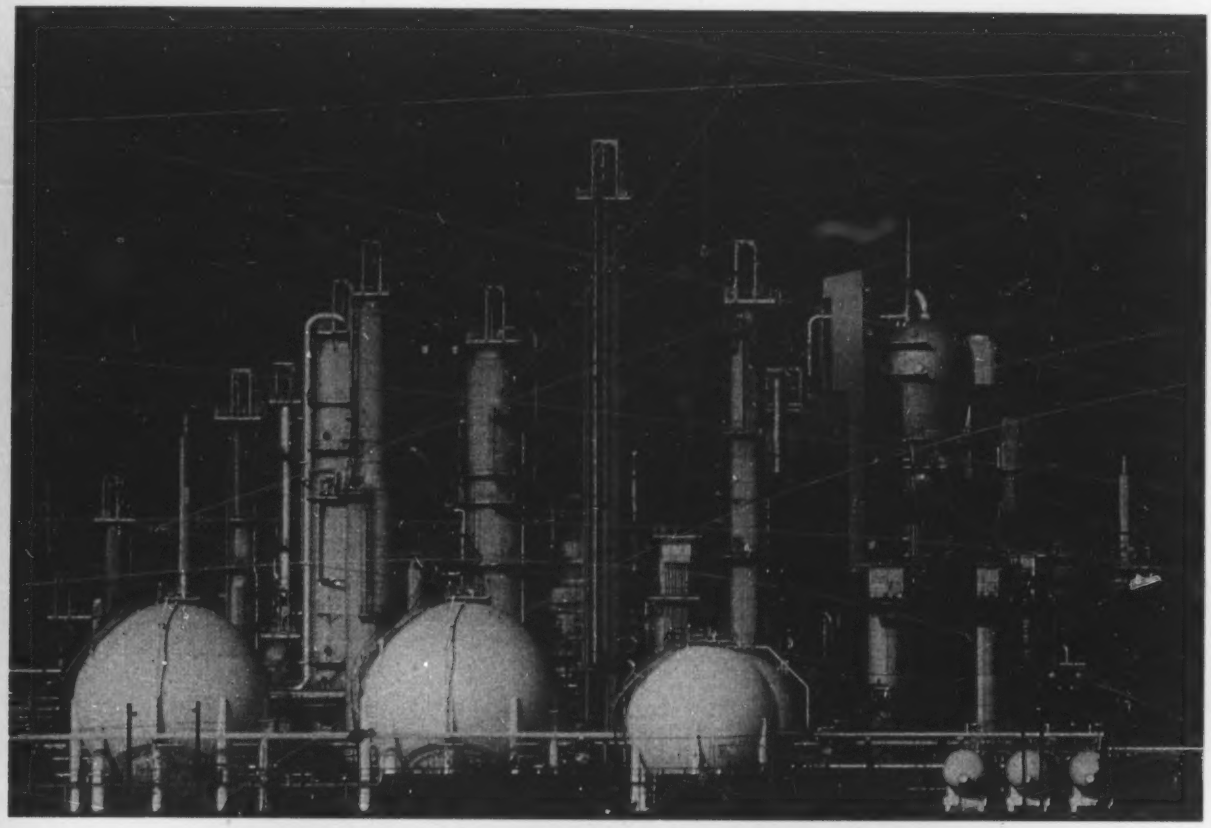

TIME TO PREPARE FOR HIGHER FUEL PRICES

Oil and U.S. government energy officials have been warning about higher fuel prices for months. Despite the warnings, they insist that few people have been listening, including truckers and transportation officials. The evidence points to a significant boost in per barrel prices within five years—a boost that could spell financial disaster for many motor carriers. OEMs have been listening and getting ready with new engine and drivetrain technology. But the big question is: How many motor carriers will be financially capable of buying diesel fuel when today's per barrel cost of $22 reaches $60 or even $100?

By **CARL GLINES**, *Executive Editor,*

The trucking industry is sitting squarely on a time bomb that has started ticking.

Within about five years, according to best estimates, the trucking industry and the rest of the country will be confronted again with rapidly escalating oil prices. The impact on trucking will be profound, informed sources said.

"Price shock has not yet set in," Charles DiBona, president of the American Petroleum Institute, said. "But it will. There will be a sharp rise in oil prices earlier than 10 years from now. The price per-barrel is going to be a lot higher."

Consider, for example, what oil

Continued

professionals are looking at.

• William Martin, deputy secretary of the Department of Energy, in an exclusive interview with CCJ: "There is trouble ahead. It would not be prudent to get 50% of our oil from the Persian Gulf. We need—trucking needs—to look at alternative fuels."

• Donald Hodel, Interior Secretary, predicts the return of gasoline lines in two years. He said increased imports and prices threaten the nation's security.

• The Fund for Renewable Energy and the Environment reported in mid-June: "The U.S. is failing to prepare for inevitable oil price increases that could imperil the national economy and country's security."

• The Aspen Institute for Humanistic Studies, in Queenstown, Md., in a report published earlier this year, states: By 1990, oil imports will account for over 40% of U.S. consumption and will likely surpass 8.6 million barrels daily. "This will hasten OPEC's return to dominance... The huge transfer of wealth to OPEC in the late 1970s and early 1980s can recur," the Institute reported.

• Speaking at the National Press Club in Washington, D.C. this spring, Dr. Armand Hammer, chairman of Occidental Petroleum Co., the world's biggest independent oil company, predicted a $100 per barrel price for imported oil in five years.

(At the time of this writing, the Interstate Commerce Commission was reporting the national average pump price of diesel was $1.06, up from 94¢ a year ago. The per barrel price had been hovering between $18 and $19. By July 17, it had reached $22.)

"The U.S. gave up its oil rights in the Persian Gulf. There is no substitute for oil. Get ready to line up at the pump and for the 'Sorry, No Gas' signs," Hammer said.

• Speaking earlier this year at the National Press Club, Chevron chairman George M. Keller said: "The decline in the nation's ability to produce domestic oil should be a matter of urgent national concern. We are now facing a much more unstable energy future that will include a sharp increase in America's dependence on foreign oil. Within three or four years, a combination of declining domestic production and rising imports could make our nation extremely vulnerable to another major energy crisis."

"Price shock has not yet set in. But it will. There will be a sharp rise in oil prices earlier than 10 years from now. The price per-barrel is going to be a lot higher." ***Charles DiBona, president of the American Petroleum Insti-***

• Fred Palmer, general manager of Western Fuels Association, said: "The energy crisis is back—it just hasn't been announced yet."

While many in the oil industry don't share the 89-year-old Hammer's alarming $100 per barrel prediction, sources do talk about oil in the $40- to $60-a-barrel range within 10 years.

At the height of the country's fuel shortage in the '70s, oil was selling at $32 a barrel. The shortfall was only 7% or 4 million barrels per day worldwide; domestic oil consumption reached over 17 million barrels per day and foreign oil accounted for 35% of that consumption.

Not everyone believes the threat of increased oil prices is as ominous as others say it is. Jack Wolfman, senior economist for Merrill Lynch Economics, New York City, believes the U.S. will see crude oil prices stay at about $25 per barrel for the next decade. Wolfman said: "Demand is not going to skyrocket and the technology and drilling rigs are available for additional exploration."

Wolfman said U.S. consumption is not rising as fast as it did during the 1970s, and the U.S. is using only 20% of its capacity to drill.

"We have a fleet of more than 4,000 on- and off-shore rigs. Today, we are using only 814 rigs."

Sources point out, however, that hundreds of those 4,000 rigs have been abandoned or cannibalized for spare parts and their usefulness for drilling is questionable, especially since many drill operators are broke. Wolfman said the average weighted price per barrel of oil in 1990 would be $20. (The weighted price includes imports and domestic oil.)

When the 1973 Arab embargo was announced, the trucking industry was totally unprepared. Fuel conservation or stretching out truck fuel mileage was not on anyone's mind. However, thanks to a cooperative crash program involving the Society of Automotive Engineers, American Trucking Associations' Maintenance Council and the Department of Transportation, industry suppliers began responding to an obvious need for new technology.

What came out of the embargo for truck users were new, fuel-efficient engines; accelerated demand for radial tires; reduced highway speeds; fan clutches and governors; aerodynamic styling and air shields; plus a new emphasis on lighter weight fiberglass tractors and RFP trailers.

Motor carriers put fuel incentive programs in place for drivers, and tighter controls over fuel use were ordered by cost-conscious managers. Fuel conservation was talked about everywhere. Gasoline prices at the pump approached $2 a gal-

IN THE SHADOW OF STONE MOUNTAIN

As incoming chairman of the American Trucking Associations, Guy Rutland III of Allied Systems Inc., will be faced with a year that is shaping up to be the most crucial period for trucking in a decade filled with crucial years. And this car hauler from Georgia is bent on making 1988 a time of coming together for the ATA and the rest of trucking because, he says, "we can't afford not to."

By **GERALD F. STANDLEY**
Editor-In-Chief

The trucking industry is under more public, political and media scrutiny than ever before, especially in the areas of safety enforcement and drivers. This will place American Trucking Associations, Inc., Alexandria, Va., under a powerful microscope.

In 1988, the industry will have to cope with a long list of pending rulemakings and legislation, the unionized segment of trucking will negotiate a new labor contract with the Teamsters, and the nation will elect a new president.

That is a glimpse at the 1988 agenda which will result in maximum overtime for ATA's Capitol Hill staff. It underscores the need for maximum effectiveness from the trucking lobby.

With that and more steaming in the industry's soup bowl, ATA must prove to itself, its members and in the political arena, that the most powerful trucking lobby can bring the industry's (and its own) fighting factions together.

To do that, ATA will need astute and persuasive leadership. In retrospect, the industry may be thankful that Guy Rutland III, a 50-year-old car hauler from Georgia, was elected 1988 chairman of ATA.

Rutland is chairman of Allied Systems, Inc., a Decatur, Ga. holding company that operates two car hauling companies – Auto Convoy of Dallas, Tex. (started by the Stewart family); and The Motor Convoy, Decatur, Ga.

The Decatur offices of Motor Convoy and Allied Systems are one and the same. The small conservative suburb sits in the shadow of Stone Mountain. A half mile beyond the trees that dominate the view from Rutland's office window is the house in which he was raised. Two blocks away is the building where the Rutland family business was started. From the day he was born, Rutland has lived, worked and played in the shadow of Stone Mountain.

Rutland's soft-spoken manner belies an inner core of adherence to principles and philosophies as strong as the granite rock that casts a figurative shadow over his hometown. Spend some time with him and it becomes obvious that the man has an incredible devotion to his family and community – a bond he is not ashamed to reveal with pride and with passion.

While he often works long

Continued